OrgPublisher 10.1 Installation Guide

aquire OrgPublisher™

Table of Contents

OrgPublisher Installation 4
OrgPublisher Client vs OrgPublisher Web Administration Installation 4
Role Requirements for Installation 5
OrgPublisher Client Role Requirements 5
OrgPublisher with Web Admin Role Requirements 5
OrgPublisher System Requirements 6
OrgPublisher Client Requirements 6
OrgPublisher Web Admin Server Requirements 6
Prerequisites for Installation 6
About Installing the OrgPublisher Trial 7
Converting the OrgPublisher Trial to the Retail Version 7
OrgPublisher Client Installation 10
OrgPublisher Client Installation Instructions 10
OrgPublisher Web Administration Installation 14
1. OrgPublisher Web Administration Installation Instructions 14
2. Configuring Groups 19
2.1 Create a Global Group on the Domain Controller 19
2.2 Create a Local Group on the Web Server 19
3. Setting NTFS Permissions 21
3.1 Set NTFS Permissions for the Opweb Folder 21
3.2 Set NTFS Permissions for the SourceCharts Folder 22
3.3 Set NTFS Permissions for the ArchivedCharts Folder 23
3.4 Set NTFS Permissions for the SearchDictionary Folder 23
3.5 Set NTFS Permissions for the PublishedCharts folder 23
4. Configure Internet Information Services (IIS) 26
4.1 Create the OrgPublisher Application Pool 26
4.2 Configure the Opweb Directory in IIS 27
4.3 Configure the SourceCharts Folder in IIS 29

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.4 Configure the ArchivedCharts Folder in IIS 30
4.5 Configure the SearchDictionary Charts Folder in IIS 31
4.6 Configure the PublishedCharts Folder in IIS 32
4.7 Enable All Unknown ISAPI Extensions 34
4.8 When Allow All Unknown ISAPI Extensions is Restricted 35
5. Setup DCOM Permissions 37
Testing OrgPublisher Web Administration 42
Prerequisites for Testing Web Administration 42
Test Web Administration 43
Prerequisites for Testing Web Admin Publishing to EChart Rich Client 43
Test Publishing an EChart Rich Client Chart 44
Web Administration Next Steps 50
Troubleshooting Tips 51

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

OrgPublisher Installation

The purpose of this document is to provide the information needed to successfully install OrgPublisher 10 on a workstation (referred to as an OrgPublisher Client installation) **or** to install OrgPublisher with Web Administration.
If installing OrgPublisher with Web Administration, refer to the set of instructions that corresponds to the type of server where OrgPublisher will be installed.
Below is a list of servers and corresponding installation guides:

Windows® Server 2003 – Use the OrgPublisher Web Administration Installation directions in this guide beginning here.

Windows® Server 2008 - Click here for the installation guide.

Windows® Server 2008 R2 - Click here for the installation guide.

OrgPublisher Client vs OrgPublisher Web Administration Installation

Each OrgPublisher license covers one installation of OrgPublisher, which can be activated by either:

1) Installing OrgPublisher on a workstation (referred to as **OrgPublisher Client** installation)
2) Installing OrgPublisher on a server with Web Administration.
   - With Web Administration, one OrgPublisher license allows up to 5 Chart Administrators to access the OrgPublisher Web Administration interface.

To determine which option to choose, the following link explains the differences between the OrgPublisher Client and OrgPublisher Web Administration:
OrgPublisher Client vs. OrgPublisher Web Administration

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Role Requirements for Installation

The type of permissions required to successfully install OrgPublisher varies depending on the chosen installation method. Please refer to the applicable role requirements below.

Note: Both the OrgPublisher Client and OrgPublisher Web Administration installation options are available with the OrgPublisher Trial.

OrgPublisher Client Role Requirements

- User must be an Administrator on the workstation where installing OrgPublisher

Note: If an error displays during the OrgPublisher Client installation, this indicates the user is not an administrator on the workstation. Please contact a member of the IT department with Administrator permissions to complete the OrgPublisher Client installation.

OrgPublisher with Web Admin Role Requirements

- User must be an Administrator on the Web Server
- Creating the Global Group (OPWeb_GG) on the Domain Controller must be completed by an administrator on the Domain Controller

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

OrgPublisher System Requirements

OrgPublisher Client Requirements

- Pentium® PC compatible or greater
- Windows® XP, Windows® Vista™, or Windows 7 operating system
- 512 MB of RAM
- 60 MB available hard disk space
- Adequate storage space for charts

OrgPublisher Web Admin Server Requirements

- Pentium® PC compatible or greater
- Microsoft® IIS (ISAPI enabled) web server running: Windows® XP, Windows® 2003, Windows® 2008 web server or Apache™ HTTP Server 2.0+ (running Windows operating system)
- Virtual directory with execute permissions for scripts and executables on the web server
- 60 MB available hard disk space
- 1 GB of RAM

Note: The OrgPublisher Web Administration Server is disabled for Windows® Vista™.

Prerequisites for Installation

The following items will be required to ensure the installation process is successful:

- Valid license key information to activate OrgPublisher 10 which includes:
  - ✓ License Key: Provided via email
  - ✓ Registered Company Name: Company name, exactly as it appears in the license key email
- If upgrading from a previous version of OrgPublisher, review the OrgPublisher Upgrade Considerations Guide prior to installation.
- If installing OrgPublisher with Web Administration, complete the following items prior to installation:
  - ✓ Confirm the server meets all Web Administration Server Requirements
  - ✓ Complete the setup of the Global Group (OPWeb_GG) described in Configuring Groups.

Note: The administrator on the server must have an administrator on the Domain Controller create the Global Group (OPWeb_GG group).

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

About Installing the OrgPublisher Trial

To download a trial of OrgPublisher, visit the Aquire web site link:
OrgPublisher Premier Trial Download

After submitting a Trial Download request to Aquire, an email with an OrgPublisher Trial product key will be sent to activate and begin the OrgPublisher Trial. The OrgPublisher Client and OrgPublisher Web Administration installation methods are available using the OrgPublisher Trial.

After purchasing the retail version of OrgPublisher, a new e-mail will be sent to the registered owner containing the following license key information:

- New Retail License Key
- Registered Company Name
- Download Instructions

The full version of OrgPublisher can be enabled by entering the new retail license key into the existing OrgPublisher Trial using the directions below.

Converting the OrgPublisher Trial to the Retail Version

Convert the OrgPublisher Trial to the full retail version using one of two methods described below:

Activation Option 1

While the trial version is in effect, each time OrgPublisher is opened, the *OrgPublisher Trial Version* dialog opens:

1. Click **Enter New Key**.

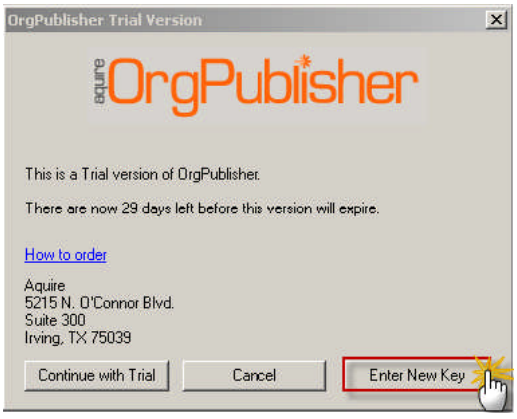

Figure 1. Enter New Key

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

2. The *License Key Entry* dialog opens. From the license key e-mail, copy and paste the following information:
   - **Retail License key**
   - **Registered Company Name**

   Then, click **OK**.

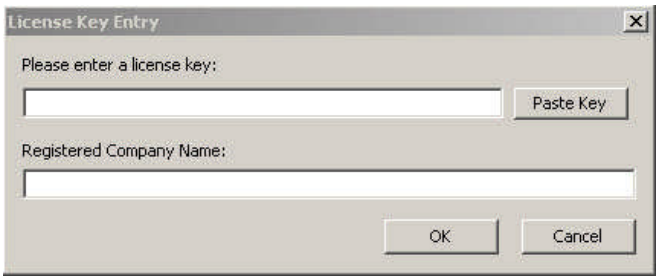

Figure 2. Copy & Paste Retail License Key Data

3. Close and reopen OrgPublisher so that the changes take effect.

Activation Option 2

1. Open the OrgPublisher Trial.
2. From the **Help** menu, select **License Information**.
3. The *Licensing Information* dialog opens. Click **Enter new key**.

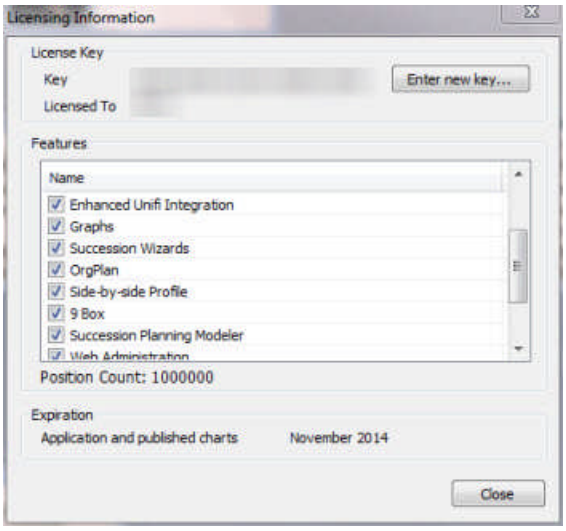

Figure 3. Licensing Information

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4. The *License Key Entry* dialog opens. From the license key e-mail, copy and paste the following information:
   - **Retail License key**
   - **Registered Company Name**

   Then, click **OK**.

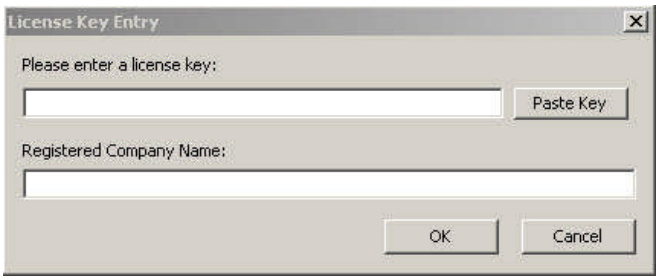

Figure 4. Copy & Paste Retail License Key Data

5. Close and reopen OrgPublisher so that the changes take effect.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

OrgPublisher Client Installation

Prior to installing the OrgPublisher Client, please review the following information to ensure the installation is successful:

- *Prerequisites for Installation*
- *Role Requirements*
- *System Requirements*

OrgPublisher Client Installation Instructions

1. From the computer where OrgPublisher will be installed, click on the OrgPublisher download link within the license key email. Select the download link for the language of the OrgPublisher 10 application preferred.

   Note: The retail/trial license key will unlock the appropriate connectors or Premier functionality. To download the OrgPublisher Trial, click on the following: Trial Download: OrgPublisher Premier

2. The download prompt displays. Click **Run** to begin the Installation or **Save and Run** to save the executable file and begin the Installation.

Figure 5. OrgPublisher Download

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

3. The *Activation Information* dialog box opens.

   Copy and paste the **License key** and **Registered Company Name** in the appropriate fields. Then, click **Next**.

   ***Note**: These values should be entered exactly as they appear in the License key email to avoid "Invalid Key" errors.*

OrgPublisher 10 Installation
Activation Information
Please enter the license key and registered company name assigned to the registered OrgPublisher 10 owner.
License key:
Registered Company Name:
Note:
If you do not have a license key, please click the More Information button.
More Information
< Back
Next >
Cancel

Figure 6. Activation Information

4. The *Welcome!* page displays. Click **Next**.

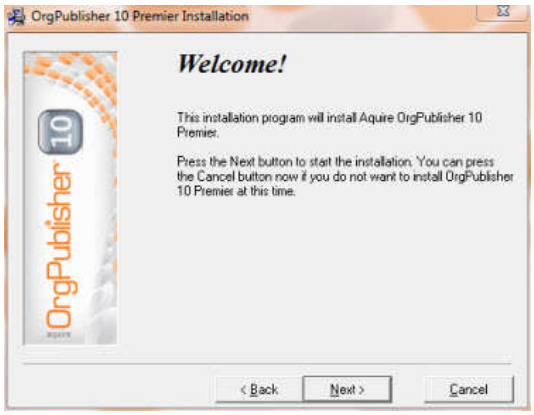
OrgPublisher 10 Premier Installation
Welcome!
This installation program will install Aquire OrgPublisher 10 Premier.
Press the Next button to start the installation. You can press the Cancel button now if you do not want to install OrgPublisher 10 Premier at this time.
< Back
Next >
Cancel

Figure 7. Welcome

5. The *License Agreement* page displays.

   Read and accept the *OrgPublisher License Agreement* by clicking **Agree**.

License Agreement
License Agreement
NOTICE TO USER: READ BEFORE INSTALLING SOFTWARE
THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT.
If you do not agree to the terms of this agreement, do not install this software.
YOU MAY NOT USE, COPY, MODIFY, OR TRANSFER THE PROGRAM OR DOCUMENTATION, OR ANY COPY EXCEPT AS EXPRESSLY PROVIDED IN THIS AGREEMENT.
Aquire ORGPUBLISHER 10 LICENSE AGREEMENT AND WARRANTY
< Back
Agree >
Cancel

Figure 8. License Agreement

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

6. The *Registration Information* dialog page displays.

   Enter:
   - **Registered user's full name**.
   - **Registered user's company name**

   Then click **Next**.

   Note: There is no specific format required for these fields.

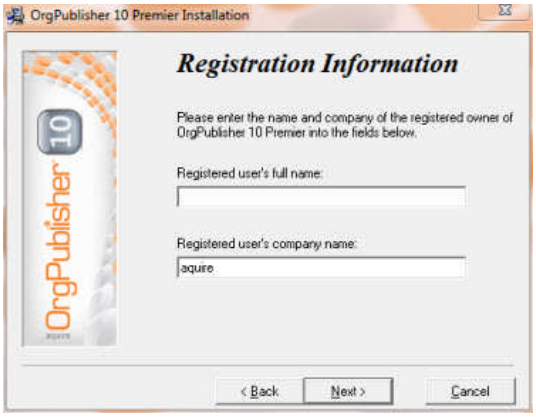
OrgPublisher 10 Premier Installation
Registration Information
Please enter the name and company of the registered owner of OrgPublisher 10 Premier into the fields below.
Registered user's full name:
Registered user's company name:
aquire
< Back
Next >
Cancel

Figure 9. Registration Information

7. The *Custom Installation Option* page opens.

   Select **OrgPublisher Install**

   Click **Next**.

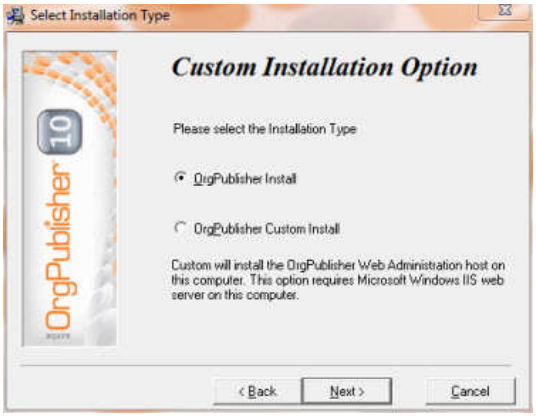
Select Installation Type
Custom Installation Option
Please select the Installation Type
OrgPublisher Install
OrgPublisher Custom Install
Custom will install the OrgPublisher Web Administration host on this computer. This option requires Microsoft Windows IIS web server on this computer.
< Back
Next >
Cancel

Figure 10. Custom Installation Option

   The *Select Destination Directory* page opens. Accept the default path shown (C:\Program Files\OrgPub10)

   OR type or browse to define a different installation directory path.

   Then click **Next**.

   An *Installing* window opens and provides a progress status as OrgPublisher is installed.

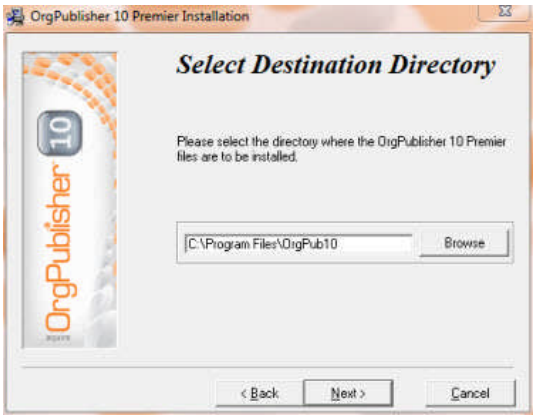
OrgPublisher 10 Premier Installation
Select Destination Directory
Please select the directory where the OrgPublisher 10 Premier files are to be installed.
C:\Program Files\OrgPub10
Browse
< Back
Next >
Cancel

Figure 11. Select Destination Directory

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Note: If an error message displays at this point in the installation process, please contact a member of the IT department who can login with administrative permissions to complete the installation.

8. The *Installation Completed!* dialog box opens to confirm that OrgPublisher successfully installed.

   Check or uncheck any of the options displayed on the page to:
   - Create an OrgPublisher icon on your desktop
   - Launch the OrgPublisher application
   - View the *Getting Started Guide*

   Then, click **Finish**.

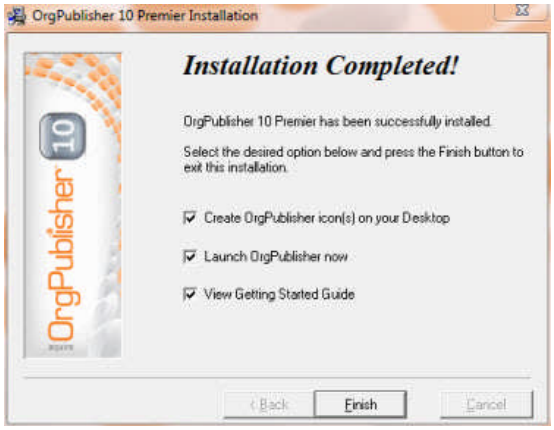
OrgPublisher 10 Premier Installation
Installation Completed!
OrgPublisher 10 Premier has been successfully installed.
Select the desired option below and press the Finish button to exit this installation.
Create OrgPublisher icon(s) on your Desktop
Launch OrgPublisher now
View Getting Started Guide
< Back
Finish
Cancel

Figure 12. Installation Completed!

The OrgPublisher Client is now installed.

Note: The **OrgPublisher Getting Started Guide** and **User manual** also can be found in the application by in the **Help** Menu options.

To publish with ECharts, additional server setup is required. ECharts are interactive charts designed for over 5,000 records and provide advanced security options.

OrgPublisher 10 EChart Server Setup Guide

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

OrgPublisher Web Administration Installation

Prior to installing OrgPublisher Web Administration, please review the following to ensure the installation is successful:

- Role Requirements
- Web Server Requirements
- Prerequisites for Installation

Check the type of server where OrgPublisher with Web Administration is being installed. The directions in this installation guide are only valid with Windows® Server 2003. Please click on the links below to access OrgPublisher Web Administration Installation guides for Windows® Server 2008 or Windows® Server 2008 R2.

Click here to open the Windows® 2008 Installation Guide.
Click here to open the Windows® 2008 R2 Installation Guide.

1. OrgPublisher Web Administration Installation Instructions for Windows® 2003 Servers

1.1 On the server, click on the OrgPublisher download link within the license key email. Select the download link for the language of the OrgPublisher 10 application preferred.

Note: The retail/trial license key will unlock the appropriate connectors or Premier functionality. To download the OrgPublisher Trial, click on the following link: Trial Download: OrgPublisher Premier

1.2 The download prompt displays. Click **Run** to begin the Installation or **Save and Run** to save the executable file and being the Installation.

Figure 13. OrgPublisher Download

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

1.3 The *Activation Information* page opens.

Copy and paste the **License key** and **Registered Company Name** in the appropriate fields. Then, click **Next**.

***Note**: These should be entered exactly as they appear in the License key email to avoid "Invalid Key" errors.*

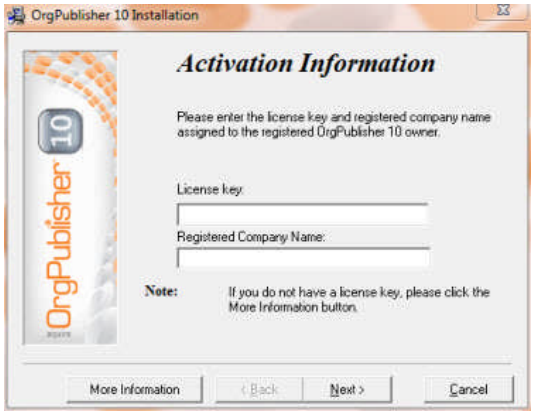
OrgPublisher 10 Installation
Activation Information
Please enter the license key and registered company name assigned to the registered OrgPublisher 10 owner.
License key:
Registered Company Name:
Note:
If you do not have a license key, please click the More Information button.
More Information
< Back
Next >
Cancel

Figure 14. Activation Information

1.4 The *Welcome!* Page displays. Click **Next**.

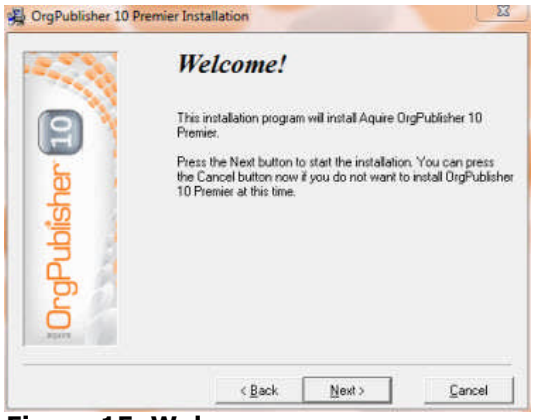
OrgPublisher 10 Premier Installation
Welcome!
This installation program will install Aquire OrgPublisher 10 Premier.
Press the Next button to start the installation. You can press the Cancel button now if you do not want to install OrgPublisher 10 Premier at this time.
< Back
Next >
Cancel

Figure 15. Welcome

1.5 The *License Agreement* page displays.

Read and accept the *OrgPublisher License Agreement* by clicking **Agree**.

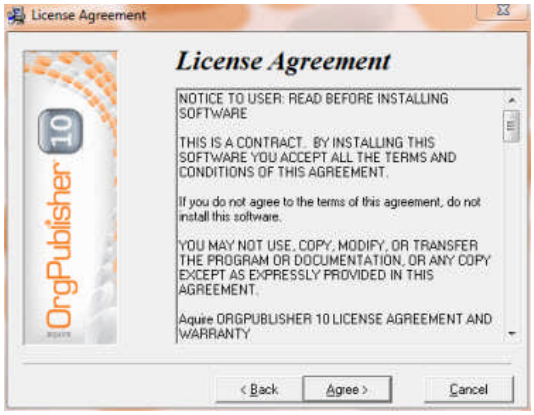
License Agreement
License Agreement
NOTICE TO USER: READ BEFORE INSTALLING SOFTWARE
THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT.
If you do not agree to the terms of this agreement, do not install this software.
YOU MAY NOT USE, COPY, MODIFY, OR TRANSFER THE PROGRAM OR DOCUMENTATION, OR ANY COPY EXCEPT AS EXPRESSLY PROVIDED IN THIS AGREEMENT.
Aquire ORGPUBLISHER 10 LICENSE AGREEMENT AND WARRANTY
< Back
Agree >
Cancel

Figure 16. License Agreement

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

1.6 The *Registration Information* screen displays. Enter:

- **Registered user's full name**.
- **Registered user's company name**

Then click **Next**.

Note: There is no specific format required for these fields.

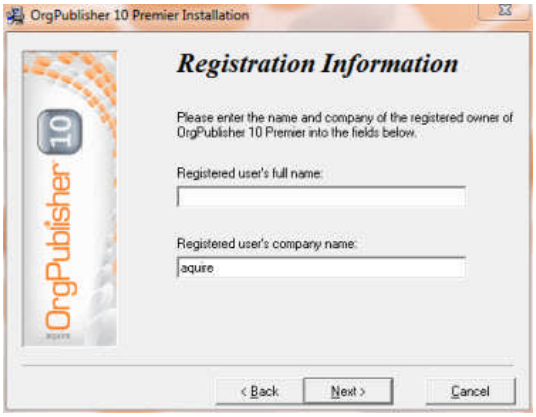
OrgPublisher 10 Premier Installation
Registration Information
Please enter the name and company of the registered owner of OrgPublisher 10 Premier into the fields below.
Registered user's full name:
Registered user's company name:
aquire
< Back
Next >
Cancel

Figure 17. Registration Information

1.7 The ***Custom Installation Option*** dialog opens.

Select **OrgPublisher Custom Install**, and then click **Next**.

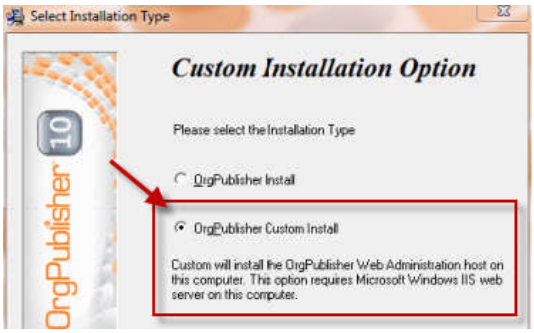
Select Installation Type
Custom Installation Option
Please select the Installation Type
OrgPublisher Install
OrgPublisher Custom Install
Custom will install the OrgPublisher Web Administration host on this computer. This option requires Microsoft Windows IIS web server on this computer.

Figure 18. Custom Installation Option

1.8 The ***Select Web Administration Destination Directory*** dialog displays. **Enter \opweb** at the end of C:\inetpub\wwwroot

Note: Verify the Web Administration Destination Directory Path = C:\inetpub\wwwroot\opweb

If this path is not entered correctly, OrgPublisher will display an error message when launching Web Administration.

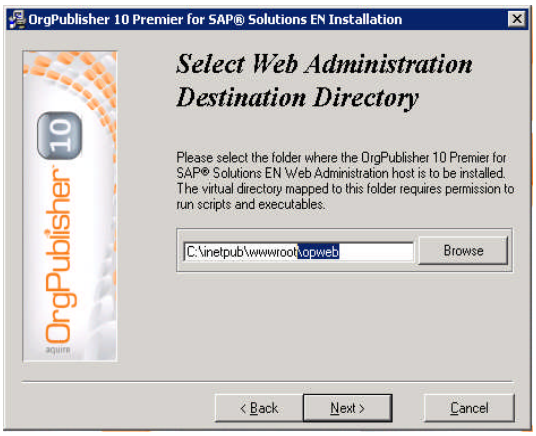
OrgPublisher 10 Premier for SAP® Solutions EN Installation
Select Web Administration Destination Directory
Please select the folder where the OrgPublisher 10 Premier for SAP® Solutions EN Web Administration host is to be installed. The virtual directory mapped to this folder requires permission to run scripts and executables.
C:\inetpub\wwwroot\opweb
Browse
< Back
Next >
Cancel

Figure 19. Enter the Physical Path

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

1.9 Click **Next** and the ***Enter the Web Administration URL*** dialog displays. **Enter /opweb** at the end of HTTP://ServerName

Note: Verify the Web Administration URL = HTTP://ServerName/opweb

The **ServerName** is the name of the server where OrgPublisher is to be installed, and the URL entered here is a virtual path that points to the physical path entered in the previous step. If another path is used, enter that path instead of the path above.

If this path is not entered correctly, OrgPublisher will display an error message when launching Web Admin.

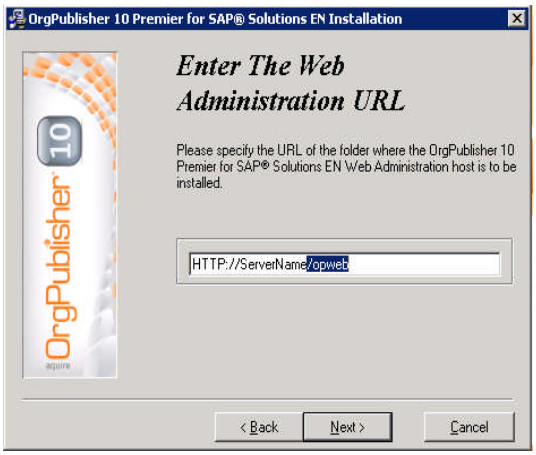
OrgPublisher 10 Premier for SAP® Solutions EN Installation
Enter The Web Administration URL
Please specify the URL of the folder where the OrgPublisher 10 Premier for SAP® Solutions EN Web Administration host is to be installed.
HTTP://ServerName/opweb
< Back
Next >
Cancel

Figure 20. Enter the Virtual Path

1.10 Click **Next** and the ***Select Destination Directory*** page displays.

Accept the default directory path (C:\Program Files\OrgPub10) OR type or Browse to change the directory path. Then, click **Next**.

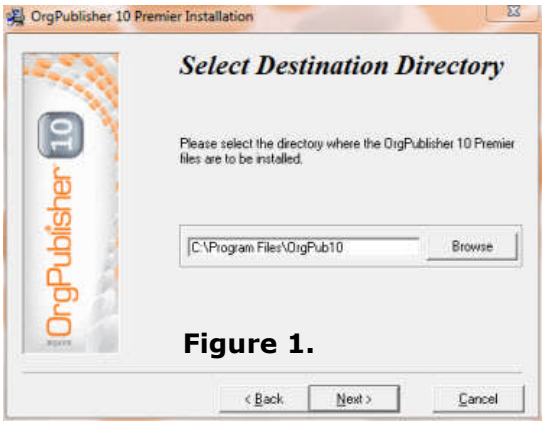
OrgPublisher 10 Premier Installation
Select Destination Directory
Please select the directory where the OrgPublisher 10 Premier files are to be installed.
C:\Program Files\OrgPub10
Browse
< Back
Next >
Cancel

Figure 1.

Figure 21. Select Destination Directory

1.11 The application install begins. When the installation is complete, the ***Installation Completed!*** dialog opens.

Select **Launch OrgPublisher now** to create a DCOM entry. The other items are optional. Click **Finish**.

Note: Launching OrgPublisher is required to create the DCOM entry which will be needed later in the OrgPublisher Web Administration installation.

OrgPublisher 10 Premier for SAP® Solutions EN Installation
Installation Completed!
OrgPublisher 10 Premier for SAP® Solutions EN has been successfully installed.
Select the desired option below and press the Finish button to exit this installation.
Optional
Create OrgPublisher icon(s) on your Desktop
Required
Launch OrgPublisher now
Optional
View Getting Started Guide
< Back
Finish
Cancel

Figure 22. Installation Completed

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

1.12 The OrgPublisher application opens. Then, close the application after it opens successfully.

1.13 Browse to the Web Administration Destination Directory Path**, C:\inetpub\wwwroot\opweb,** entered in Step 1.8.

The following folders and files are created in the Web Admin installation:

- ArchivedCharts folder
- PublishedCharts folder
- SearchDictionary folder
- SourceCharts folder
- OPAdmin.htm
- OPAdmin.js
- OPAdmin.opw
- Remoteserver.dll

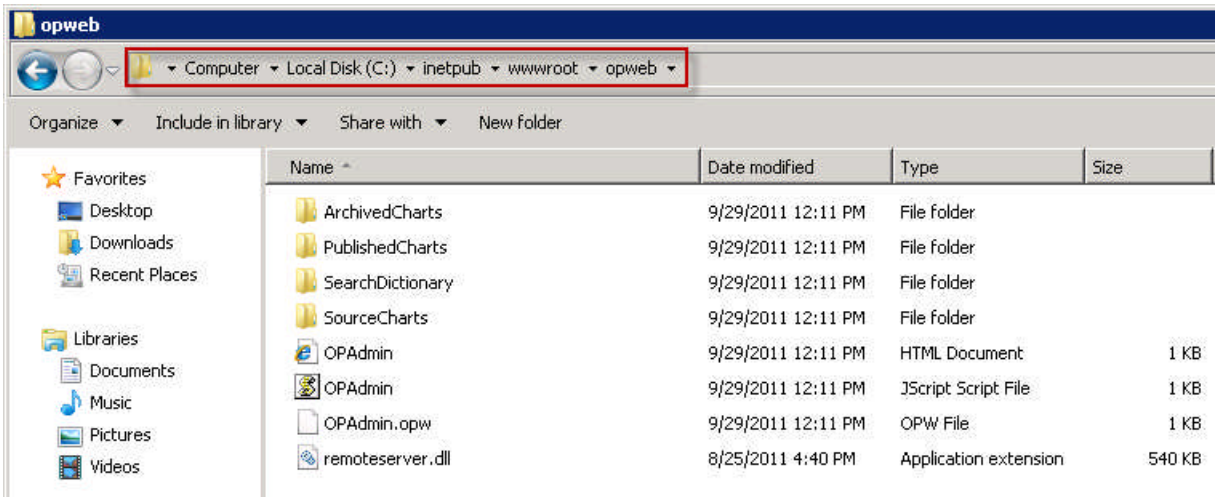

Figure 22. Opweb Folder

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

2. Configuring Groups

The following groups are required to setup access to OrgPublisher Web Administration.

2.1 Create a Global Group on the Domain Controller

Note: The OPWeb_GG group must be created by an Administrator on the Domain Controller.

Create a Global Group titled OPweb_GG.

2.1-1 Add the OrgPublisher Chart Administrator Users to the global group.

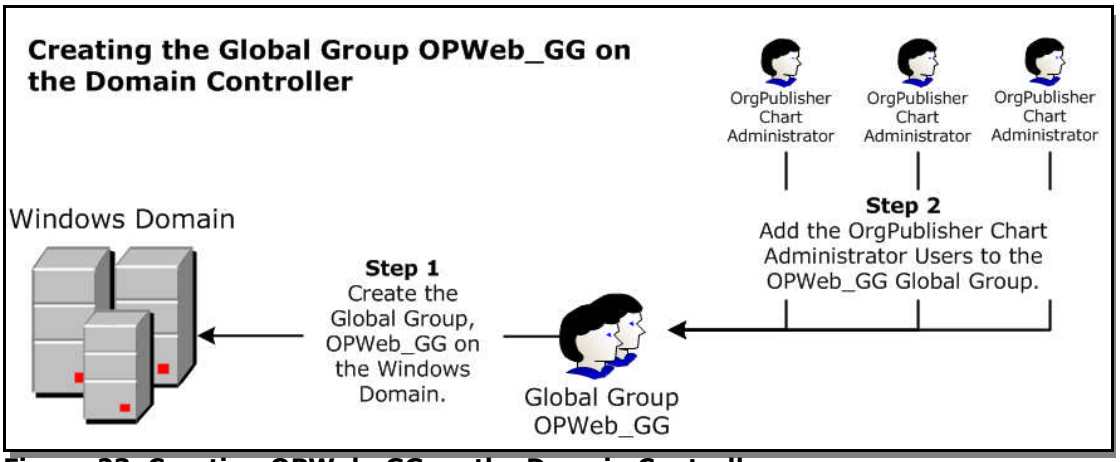
Creating the Global Group OPWeb_GG on the Domain Controller
OrgPublisher Chart Administrator
OrgPublisher Chart Administrator
OrgPublisher Chart Administrator
Windows Domain
Step 1
Create the Global Group, OPWeb_GG on the Windows Domain.
Global Group OPWeb_GG
Step 2
Add the OrgPublisher Chart Administrator Users to the OPWeb_GG Global Group.

Figure 23. Creating OPWeb_GG on the Domain Controller.

2.2 Create a Local Group on the Web Server

Note: The OPWeb_LG group must be setup by an Administrator on the Server. **Setup of the OPWeb_LG group must be completed prior to moving on with the installation.**

Create a Local Group titled OPweb_LG.

2.2-1 Click **Start -> All Programs -> Administrative Tools -> Computer Management**

2.2-2 In the *Computer Management* dialog, expand **Local Users and Groups**

2.2-3 Select the **Groups** folder

2.2-4 In the Actions Menu, select **New Group**

Figure 24. Creating the OPWeb_LG group

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

2.2-5 In the *New Group* dialog**, enter OPWeb_LG** in the Group Name field.
2.2-6 Click **Add**, and select the Domain Global Group (**OPWeb_GG**) group. Click **OK** when finished.
2.2-7 In the *New Group* dialog, select **Create** and the OPWeb_LG group should appear in the list of Local Groups.

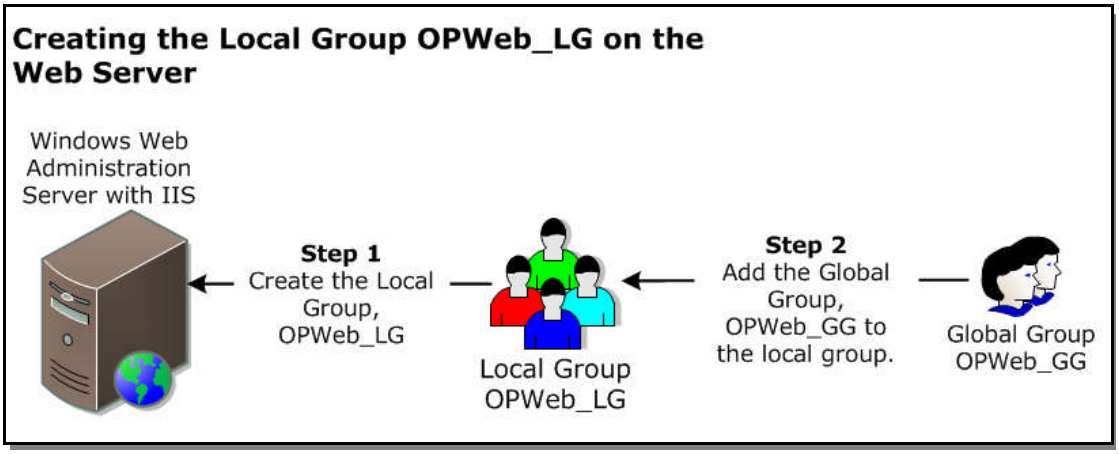
Creating the Local Group OPWeb_LG on the Web Server
Windows Web Administration Server with IIS
Step 1
Create the Local Group, OPWeb_LG
Local Group OPWeb_LG
Step 2
Add the Global Group, OPWeb_GG to the local group.
Global Group OPWeb_GG

Figure 25. Creating the OPWeb_LG Group on the Web Server.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

3. Setting NTFS Permissions

NTFS Permissions must be configured to access and secure OrgPublisher Web Administration.

3.1 Set NTFS Permissions for the Opweb Folder

3.1-1 Navigate to **C:\inetpub\wwwroot**

3.1-2 Right-click on the **opweb** folder and choose **Properties**.

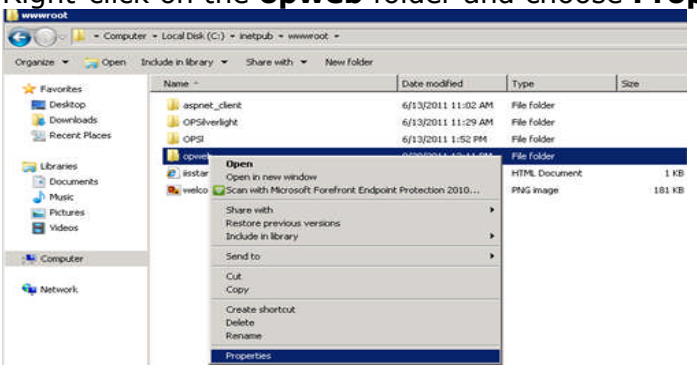

Figure 26: Opweb Properties

3.1-3 Select the **Security** tab.

3.1-4 Click **Edit** and the Permissions for opweb dialog opens.

3.1-5 Click **Add**. Then, click **Locations** and change the location to the **Server**. Click **OK**.

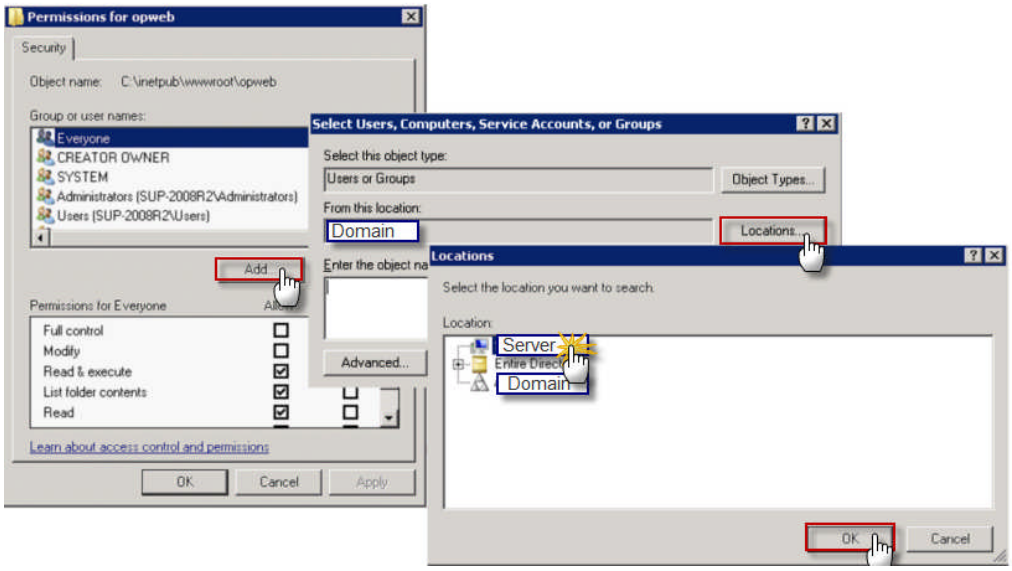

Figure 27. Opweb Security

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

3.1-6 In the **Select Users or Groups** dialog, click **Advanced** and in the dialog that displays, select **Find Now**.

3.1-7 Select the following groups from the search results and click **OK**:

- **Local Administrators Group**
- **OPWeb_LG**
- **Network Service**
- **IIS_WPG** (Worker Process Group)

Click **OK** to add the groups.

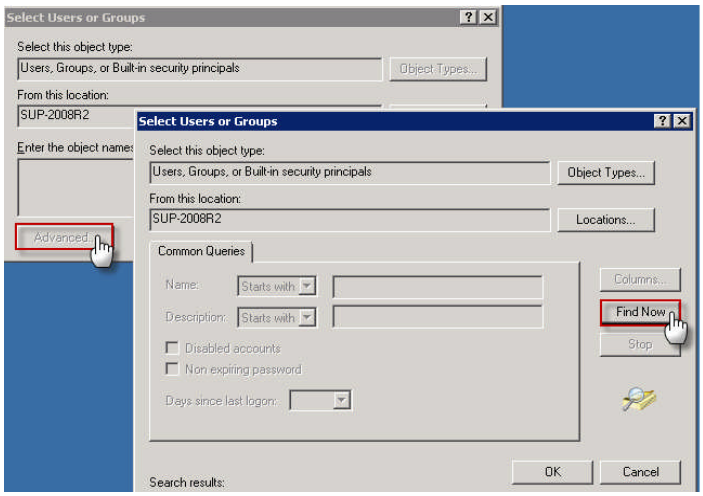

Figure 28. Select Users or Groups

3.1-8 Set the following NTFS permission for the **Opweb** folder:

- Local **Administrators Group –** Full Control
- **OPWeb_LG –** Modify
- **Network Service** – Read and Execute
- **IIS_WPG** (Worker Process Group) – Read and Execute

Note: Remove the **Everyone Group** from the **Opweb** folder

3.2 Set NTFS Permissions for the SourceCharts Folder

3.2-1 Navigate to the C:\inetpub\wwwroot\opweb

3.2-2 Right-click on the SourceCharts folder and choose Properties

3.2-3 Repeat steps 3.1-1 through 3.1-8 for the **SourceCharts** folder.

SourceCharts folder - NTFS permissions:

- **Local Administrators Group –** Full Control
- **OPWeb_LG –** Modify
- **Network Service** – Read and Execute
- **IIS_WPG** (Worker Process Group) – Read and Execute

Note: **Remove** the **Everyone Group** in the **Sourcecharts** folder.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

3.3 Set NTFS Permissions for the ArchivedCharts Folder

3.3-1 Navigate to the C:\inetpub\wwwroot\opweb
3.3-2 Right-click on the ArchivedCharts folder and choose Properties
3.3-3 Repeat steps 3.1-1 through 3.1-8 for the **ArchivedCharts** folder.

ArchivedCharts folder - NTFS permissions:

- **Local Administrators Group –** Full Control
- **OPWeb_LG –** Modify
- **Network Service** – Read and Execute
- **IIS_WPG** (Worker Process Group)

Note: **Remove** the **Everyone Group** in the **ArchivedCharts** folder.

3.4. Set NTFS Permissions for the SearchDictionary Folder

3.4-1 Navigate to the C:\inetpub\wwwroot\opweb
3.4-2 Right-click on the SearchDictionary folder and choose Properties
3.4-3 Repeat steps 3.1-1 through 3.1-8 for the **SearchDictionary** folder.

SearchDictionary folder - NTFS permissions:

- **Local Administrators Group –** Full Control
- **OPWeb_LG –** Modify
- **Network Service** – Read and Execute
- **IIS_WPG** (Worker Process Group) – Read and Execute

Note: **Remove** the **Everyone Group** in the **SearchDictionary** folder.

3.5. Set NTFS Permissions for the PublishedCharts folder

3.5-1 Navigate to the C:\inetpub\wwwroot\opweb
3.5-2 Right-click on the PublishedCharts folder and choose Properties
3.5-3 Select the **Security** tab.
3.5-4 Click **Edit** and the Permissions for **PublishedCharts** dialog opens.
3.5-5 Click **Add**. Then, click **Locations** and change the location to the Server. Click **OK**.
3.5-6 In the ***Select Users or Groups*** dialog, click **Advanced** and in the dialog that displays, select **Find Now**.
3.5-7 Select the following **groups** from the search results and click **OK**:

- **Local Administrators Group**
- **OPWeb_LG**
- **Network Service**
- **IIS_WPG** (Worker Process Group)
- **Users Group**

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

3.5-8 Click **OK** to add the groups.

3.5-9 **PublishedCharts** folder - NTFS permissions:

- Local **Administrators Group –** Full Control
- **OPWeb_LG –** Modify
- **Network Service** – Read and Execute
- **IIS_WPG** (Worker Process Group) – Read and Execute
- **Users Group** – Read and Execute

Note: **Removing the Everyone Group is not required for the PublishedCharts** folder. However, edit the permissions and **remove Write permissions if enabled**.

The Everyone Group should only have read and execute permissions enabled on the **PublishedCharts** folder.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Web Admin NTFS Rights Graphic

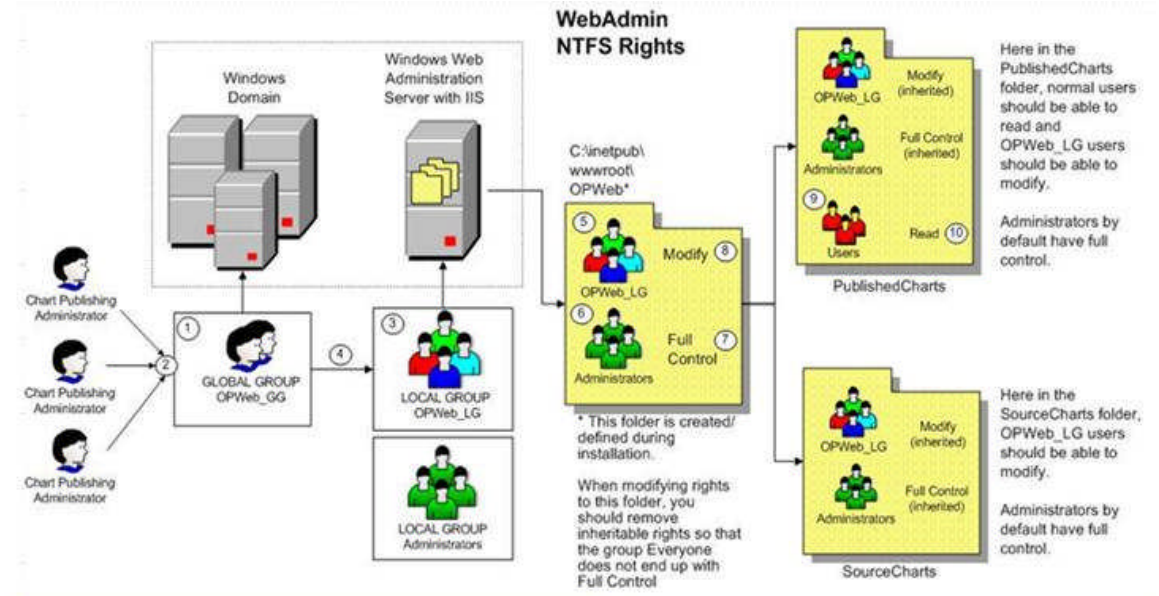

DIAGRAM NOTES

1. Create a global group on a Domain computer.
2. Add chart administrators to the global group.
3. Create a local group on the Web server.
4. Add the global group from Step 1 to the local group.
5. Add the local group created in Step 3 to the OPWeb folder.
6. Add the Administrators group to the OPWeb folder.
7. Grant Full Control permissions to the Administrator's group.
8. Grant Modify permissions to the local group.
9. Add the Users group to the PublishedCharts folder.
10. Grant Read permissions to the Users group, revoking all other permissions.

REDIRECT NOTES: For security reasons, some users will want to publish different charts to different URLs. To accommodate this, we allow users to create alternate destination directories for publishing.

An ini file (RemoteServer.ini) may exist on the Web server. This file will use the standard ini file format and may contain a section named [PublishFolders]. Each item in this section will describe a publishing destination directory in the format http://DestinationUrl=c:\inetpub\wwwroot\MyFolder.

When alternate publishing directories are defined, the Publishing Wizard will display a combo box allowing the user to access to any one of the alternate publishing URLs.

Figure 30. Web Admin NTFS Rights Graphic

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4. Configure Internet Information Services (IIS)

4.1 Create the OrgPublisher Application Pool

4.1-1 In IIS, expand the Server and then Application Pools.

4.1-2 Right click on **Application Pools**. Go to **New** and select **Application Pool…**

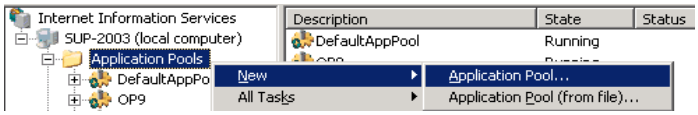

Figure 31. New Application Pool

4.1-3 The *Add New Application Pool* dialog opens. Enter **OrgPublisher** in the *Application pool ID* field. Select **Use default settings for new application pool**. Then Click **OK**.

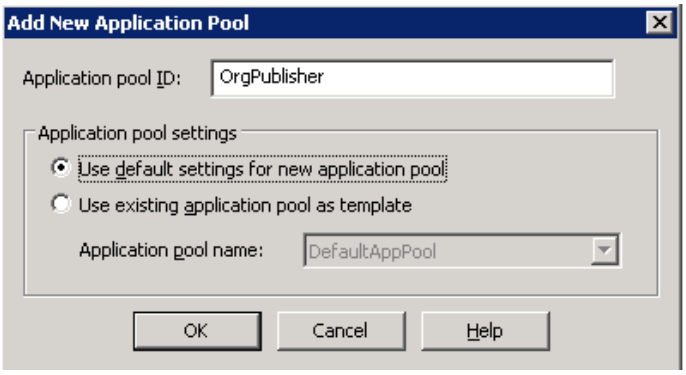

Figure 32. Enter the Application Pool ID

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.2 Configure the Opweb Directory in IIS

4.2-1 In IIS, expand Web Sites and right-click on the **opweb** virtual directory. Select **Properties**.

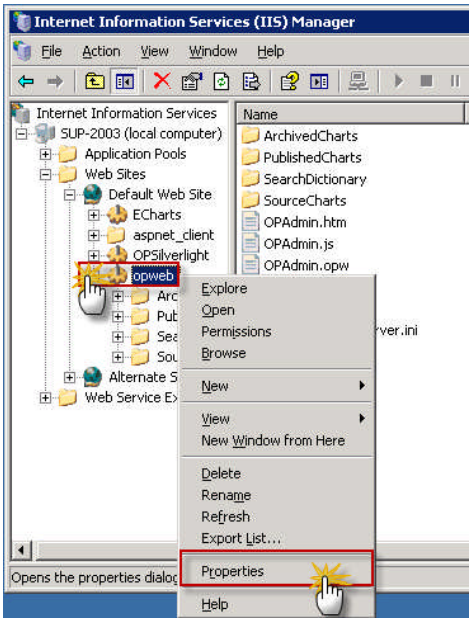

Figure 33. IIS ECharts Properties

4.2-2 The *Opweb Properties* dialog opens to the **Directory** tab.

4.2-3 Check the **Read** check box.

4.2-4 In the *Execute Permissions* dropdown, select **Scripts and Executables**.

4.2-5 In the *Application Pool* dropdown, select **OrgPublisher**.

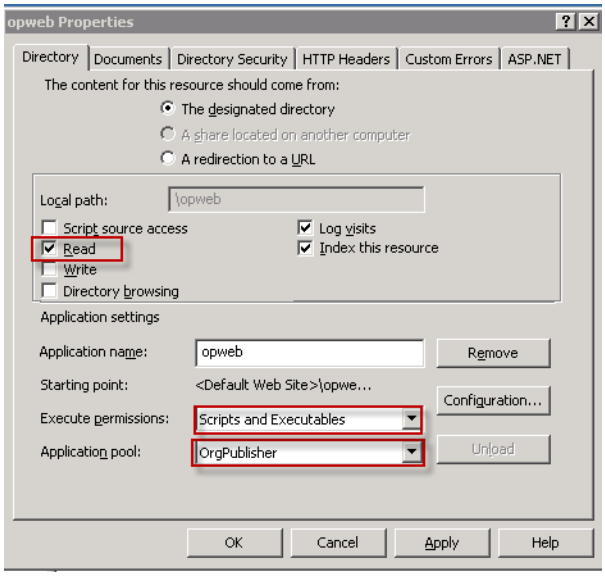

Figure 34. Virtual Directory Tab

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.2-6 Now, select the **Directory Security Tab**.

4.2-7 In the **Authentication and access control** section, click **Edit**.

4.2-8 The *Authentication Methods* dialog opens. Confirm that **Enable Anonymous access is NOT selected**.

4.2-9 Check **Integrated Windows Authentication**.

4.2-10 Click **OK**.

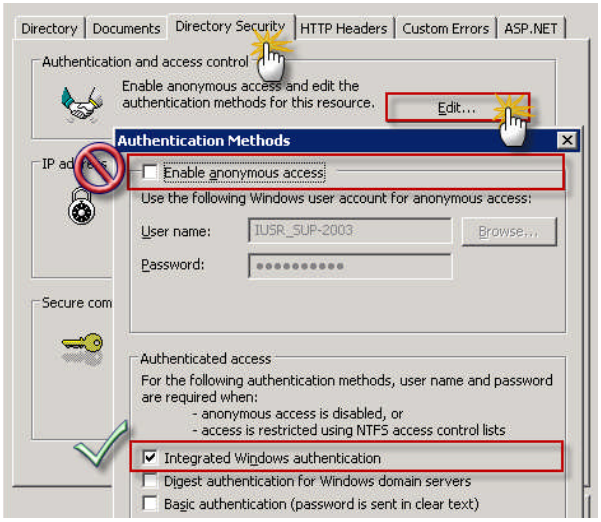

Figure 35. Authentication

4.2-11 Select the **HTTP Headers** tab.

4.2-12 In the *MIME types* section, click on **MIME Types**.

4.2-13 In the window that displays, click **New**.

4.2-14 The *MIME Type* dialog displays.

In the Extension field, enter **.ocp**

In the MIME type field enter **application/orgpublisher**

4.2-15 Click **OK** 3 times to close the *Opweb Properties* dialog.

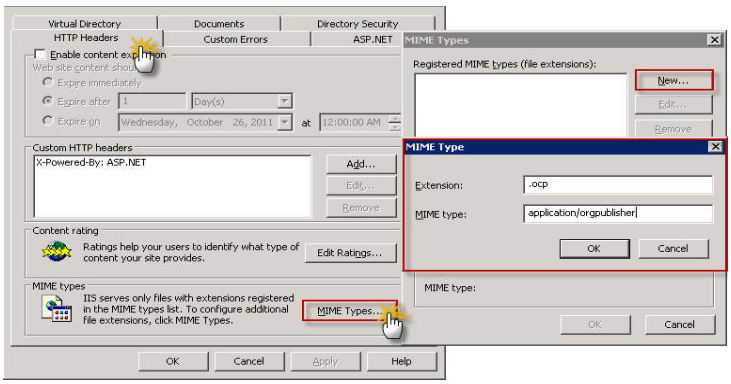

Figure 36. Set the .ocp MIME type

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.3 Configure the SourceCharts Folder in IIS

4.3-1 In IIS, click to expand the **opweb** virtual directory. Then, right click on the SourceCharts folder and select **Properties**.

4.3-2 The *SourceCharts Properties* dialog opens to the **Directory** tab.

4.3-3 Check the **Read** check box.

4.3-4 In the *Execute Permissions* dropdown, select **Scripts and Executables**.

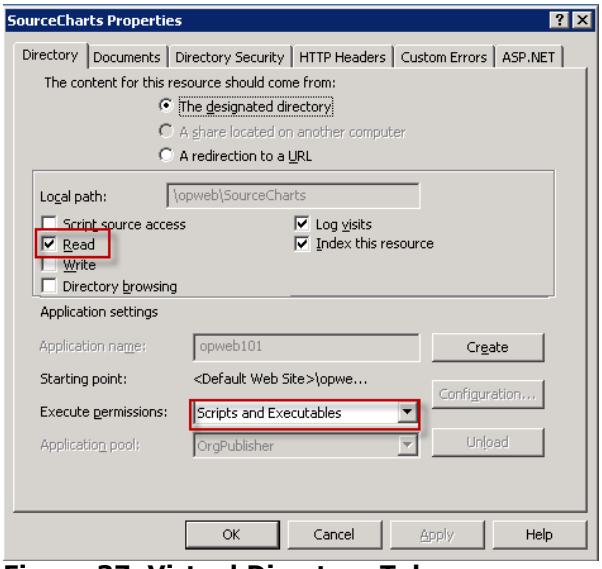

Figure 37. Virtual Directory Tab

4.3-5 Now, select the **Directory Security Tab**.

4.3-6 In the **Authentication and access control** section, click **Edit**.

The *Authentication Methods* dialog opens. Confirm that **Enable Anonymous access is NOT selected**.

Check **Integrated Windows Authentication**.

4.3-7 Click **OK** until you close out the dialog box.

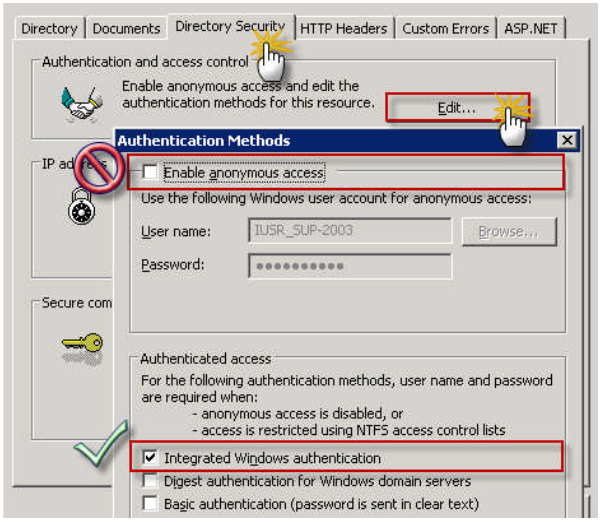

Figure 38. Authentication

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.4 Configure the ArchivedCharts Folder in IIS

4.4-1 In IIS, right click on the ArchivedCharts folder and select **Properties**.

4.4-2 The *ArchivedCharts Properties* dialog opens to the **Directory** tab.

4.4-3 Check the **Read** check box.

4.4-4 In the *Execute Permissions* dropdown, select **Scripts and Executables**.

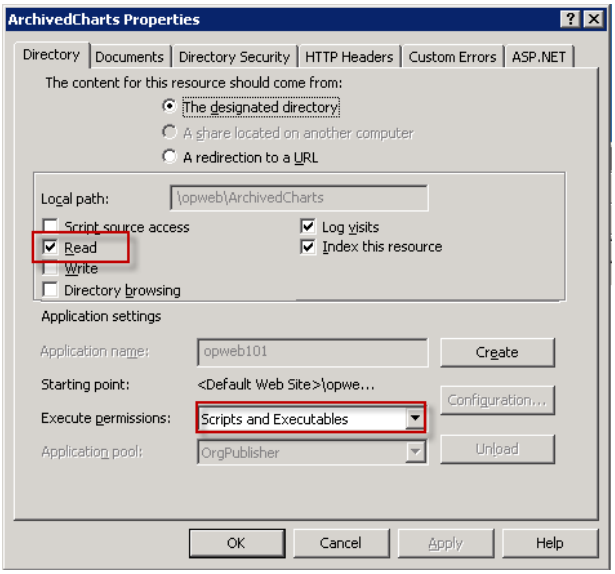

Figure 39. Directory Tab

4.4-5 Now, select the **Directory Security Tab**.

4.4-6 In the **Authentication and access control** section, click **Edit**.

The *Authentication Methods* dialog opens. Confirm that **Enable Anonymous access is NOT selected**.

Check **Integrated Windows Authentication**.

4.4-7 Click **OK** until you close out the dialog box.

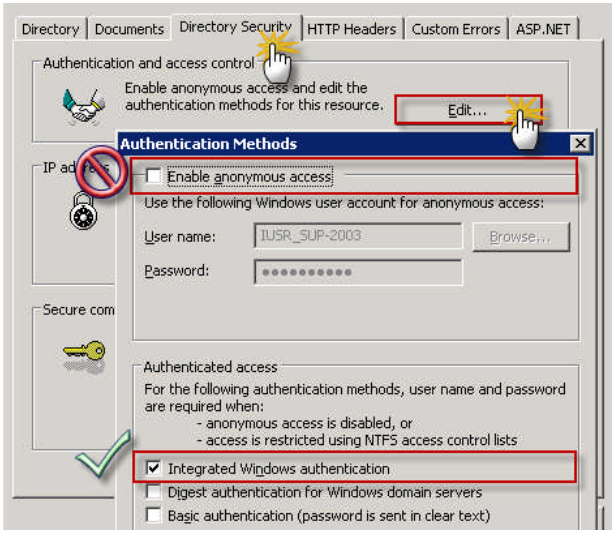

Figure 40. Authentication

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.5 Configure the SearchDictionary Charts Folder in IIS

4.5-1 In IIS, right click on the SearchDictionary folder and select **Properties**.

4.5-2 The *SearchDictionary Properties* dialog opens to the **Directory** tab.

4.5-3 Check the **Read** check box.

4.5-4 In the *Execute Permissions* dropdown, select **Scripts and Executables**.

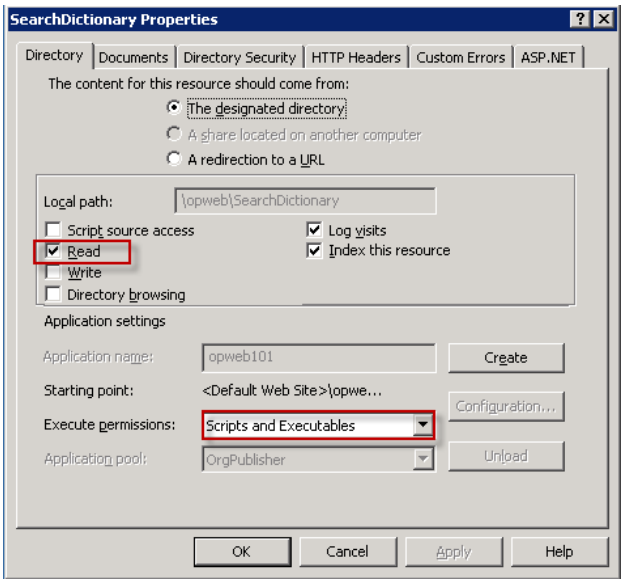

Figure 41. Directory Tab

4.5-5 Now, select the **Directory Security Tab**.

4.5-6 In the **Authentication and access control** section, click **Edit**.

The *Authentication Methods* dialog opens. Confirm that **Enable Anonymous access is NOT selected**.

Check **Integrated Windows Authentication**.

4.5-7 Click **OK** until you close out the dialog box.

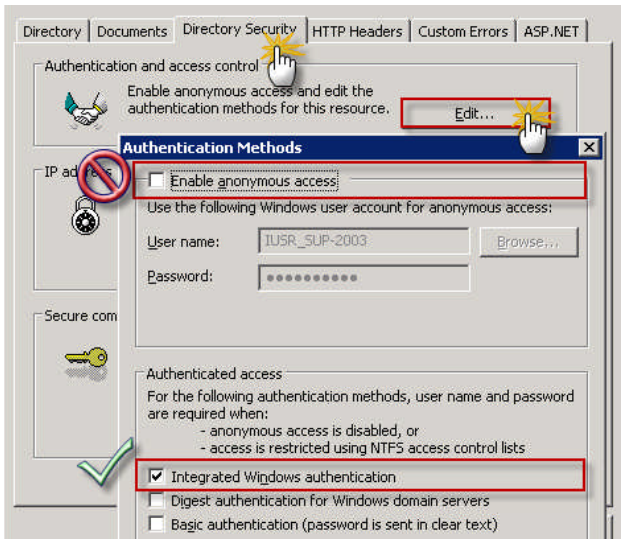

Figure 42. Authentication

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.6 Configure the PublishedCharts Folder in IIS

4.6-1 In IIS, right click on the PublishedCharts folder and select **Properties**.

4.6-2 The *PublishedCharts Properties* dialog opens to the **Directory** tab.

4.6-3 Check the **Read** check box.

4.6-4 In the *Execute Permissions* dropdown, select **Scripts and Executables**.

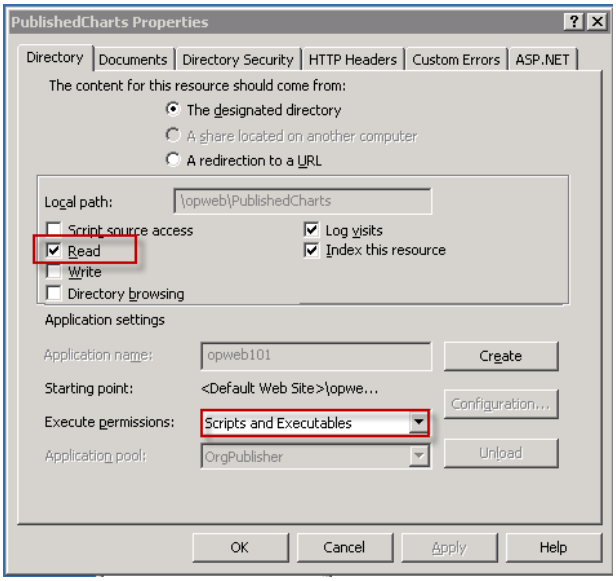

Figure 41. Directory Tab

4.6-5 Now, select the **Directory Security Tab**.

4.6-6 In the **Authentication and access control** section, click **Edit**.

The *Authentication Methods* dialog opens. Confirm that **Enable Anonymous Access IS selected**.

Verify that the account is the correct **IUSR** account.

Check **Integrated Windows Authentication**.

4.6-7 Click **OK** until you close out the dialog box.

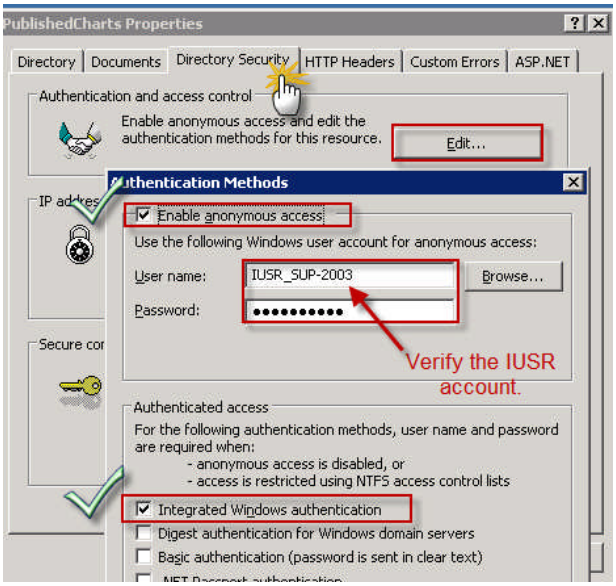

Figure 42. Authentication

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.6-8 Select the **HTTP Headers** tab.

4.6-9 In the *MIME types* section, click on **MIME Types**.

4.6-10 In the window that displays, click **New**.

4.6-11 The *MIME Type* dialog displays.

In the Extension field, enter **.ocp**

In the MIME type field, enter **application/orgpublisher**

4.6-12 Click **OK** 3 times to close the *PublishedCharts Properties* dialog.

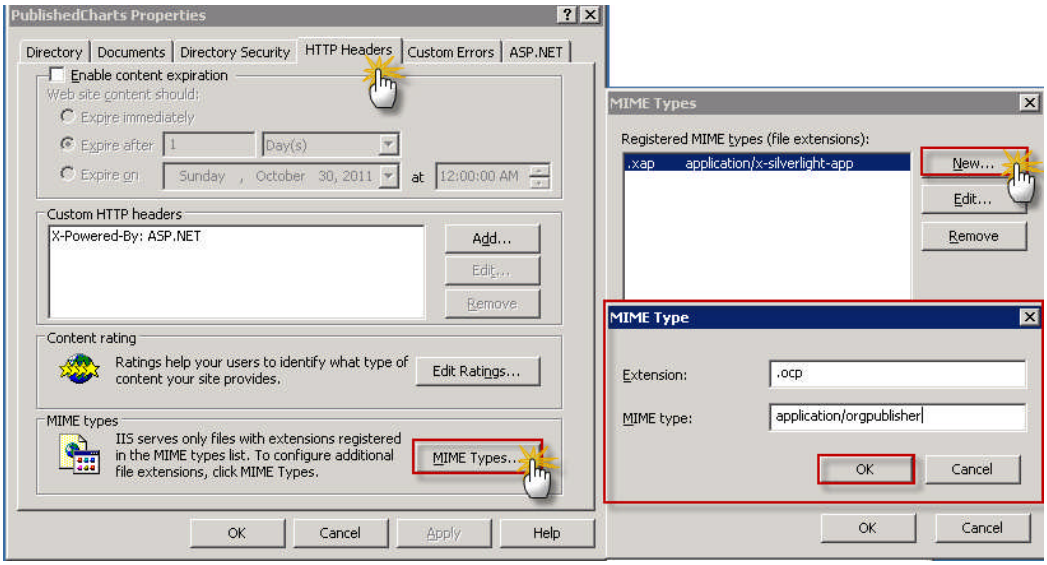

Figure 43. Set the .ocp MIME type

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.7 Enable All Unknown ISAPI Extensions

Note: This step will enable All Unknown ISAPI extensions to run on the web server. If IT security policy restricts allowing all ISAPI extensions, please refer to step 4.8 for an alternate configuration.

The directions below (for step 4.7) require a one-time setup by the Web Server Administrator. Using the alternate setup, the Web Server Administrator will need to enable each chart.dll web extension each time a new chart is published by the Chart Administrator. Please contact the Domain Administrator to clarify which configuration will meet the IT Security Policy requirements.

4.7-1 In IIS, click on the **Web Service Extensions** folder.

4.7-2 In the *Web Service Extension* list, right click on **All Unknown ISAPI Extensions**. Then, select **Allow**.

4.7-3 A security prompt displays. Click **Yes** to enable all unknown ISAPI extensions.

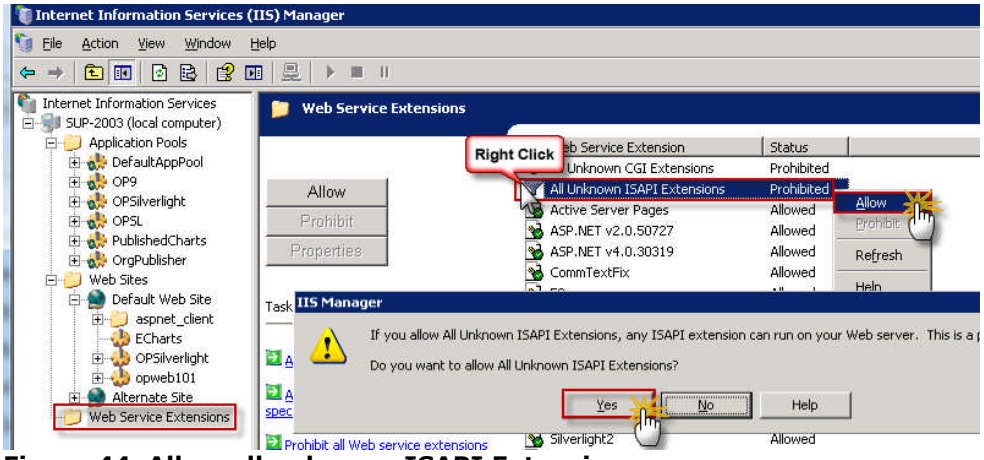

Figure 44. Allow all unknown ISAPI Extensions.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4.8 When Allow All Unknown ISAPI Extensions is Restricted

Note: If step 4.7 was completed, skip this step and continue with step 5. Using the configuration below (in step 4.8), the Web Server Administrator will need to enable each chart.dll web extension when new charts are published by the Chart Administrator. *The second part of this configuration cannot be completed until an EChart has been published.*

Please contact the Domain Administrator to clarify which configuration will meet the IT Security Policy requirements.

The directions below are intended for organizations with an IT Security Policy that restricts setting All Unknown ISAPI Extensions to Allow. Initially, a remoteserver.dll web extension must be setup. Then, the Web Server administrator will need to configure a **chart.dll** web extension each time a new EChart is published (producing a new chart.dll).

Setup the Remoteserver.dll Web Extension

4.8-1 Open IIS, and click on **Web Service Extensions**
4.8-2 Under *Tasks,* click on **Add a new Web Service extension**
4.8-3 The *New Web Service Extension* dialog opens. In the Extension Name field, Enter **remoteserver.dll**
4.8-4 Click **Add** and the *Add file* dialog opens.
4.8-5 Enter the path: C:\inetpub\wwwroot\opweb\remoteserver.dll
4.8-6 **Check** the option to **Set extension status to Allowed**. Then, click **OK**.

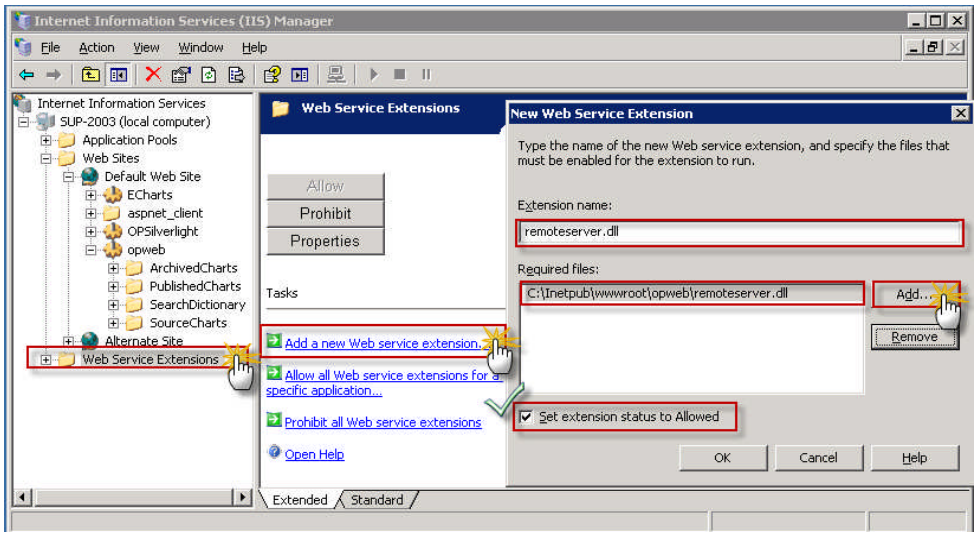

Figure 45. Add remoteserver.dll

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Setup the Published Chart.dll

Note: If a chart has not been published to the PublishedCharts folder, continue Step 5.

4.8-7 When a new chart is published, a dll file is produced. This is visible in the PublishedCharts folder (C:\inetpub\wwwroot\opweb\PublishedCharts)

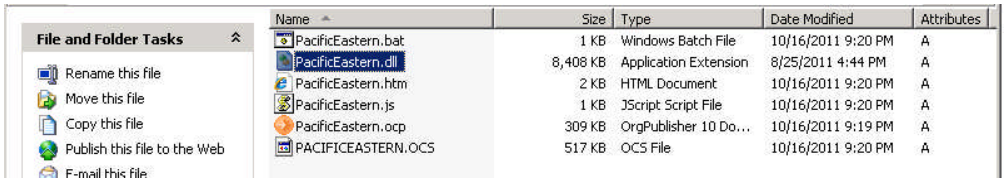
File and Folder Tasks
Rename this file
Move this file
Copy this file
Publish this file to the Web
E-mail this file
Name
Size
Type
Date Modified
Attributes
PacificEastern.bat 1 KB Windows Batch File 10/16/2011 9:20 PM A
PacificEastern.dll 8,408 KB Application Extension 8/25/2011 4:44 PM A
PacificEastern.htm 2 KB HTML Document 10/16/2011 9:20 PM A
PacificEastern.js 1 KB JScript Script File 10/16/2011 9:20 PM A
PacificEastern.ocp 309 KB OrgPublisher 10 Do... 10/16/2011 9:19 PM A
PACIFICEASTERN.OCS 517 KB OCS File 10/16/2011 9:20 PM A

Figure 46. New published chart dll

4.8-8 Open IIS, and click on **Web Service Extensions**

4.8-9 Under *Tasks*, click on **Add a new Web service extension**

4.8-10 The *New Web Service Extension* dialog opens. In the Extension Name field, **enter the new dll name**. (Ex. PacificEastern.dll)

4.8-11 Click **Add** and the *Add file* dialog opens.

4.8-12 Enter or browse to the path to the new chart dll. Then click **OK**.
Example: C:\inetpub\wwwroot\PublishedCharts\PacificEastern.dll

4.8-13 **Check** the option to **Set extension status to Allowed**. Then, click **OK**.

Note: Each time a new chart is published (and a new dll is produced) the administrator will need to follow steps 4.8-7 to 4.8-13 to allow the dll file. Otherwise, users will not be able to view the EChart.

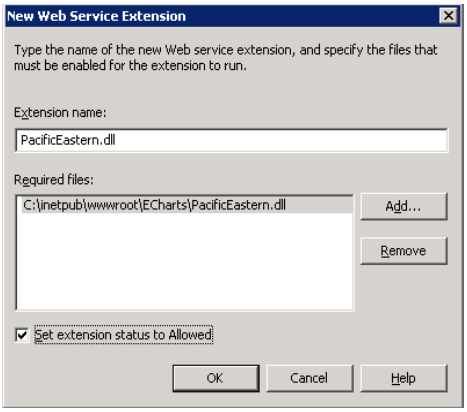

Figure 47. Add Web Extension

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

5. Setup DCOM Permissions

5.1. Launch OrgPublisher on the server. Close the application after it opens.

5.2. Go to the **Start** menu, select **Run**.

5.3. Enter **dcomcnfg** and select **OK**.

Note: *If you receive a **CLSID Warning** message, click **Yes**.*

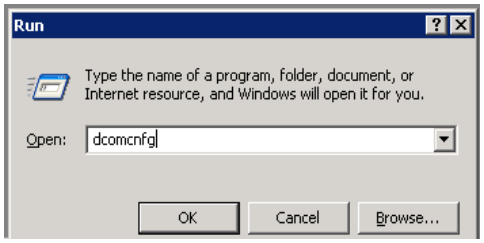

Figure 48. Launch DCOM

5.4 Expand **Component Services**, **Computers**, **My Computer**. Then, click on **DCOM Config**

5.5 Navigate to **OrgPublisher X Document**. Right click and select **Properties**.

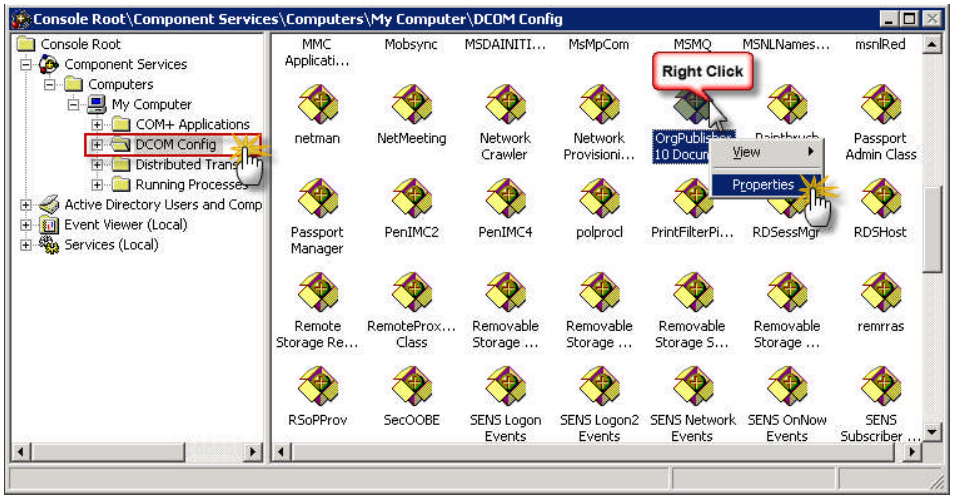

Figure 49. OrgPublisher X Document Properties

Note: If you installed a previous version of OrgPublisher on your computer, you will see **OrgPublisher X Document**, where **X** is the previous version number. Use that document.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

5.6 The **OrgPublisher X Document Properties** Opens.
5.7 Select the **Security Tab**.

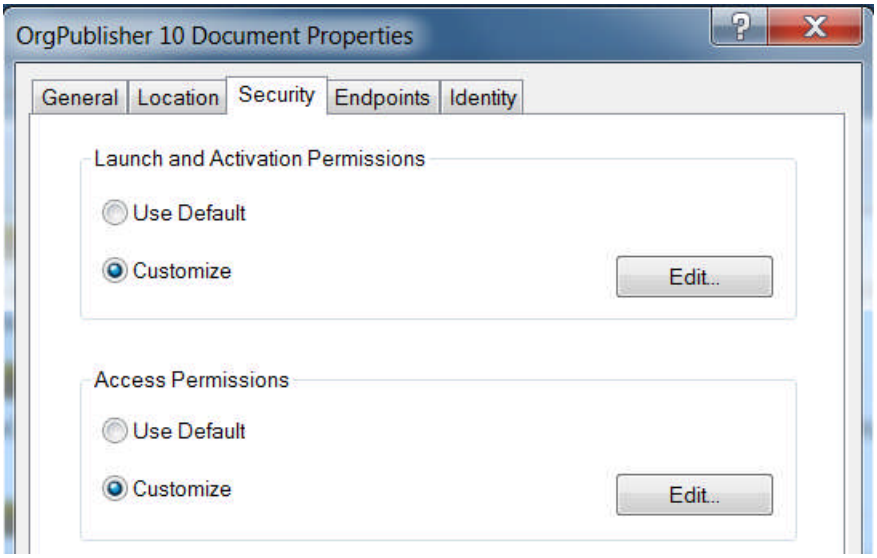

Figure 50. OrgPublisher X Document Security

5.8 Under **Launch and Activation Permissions**, click **Edit**.

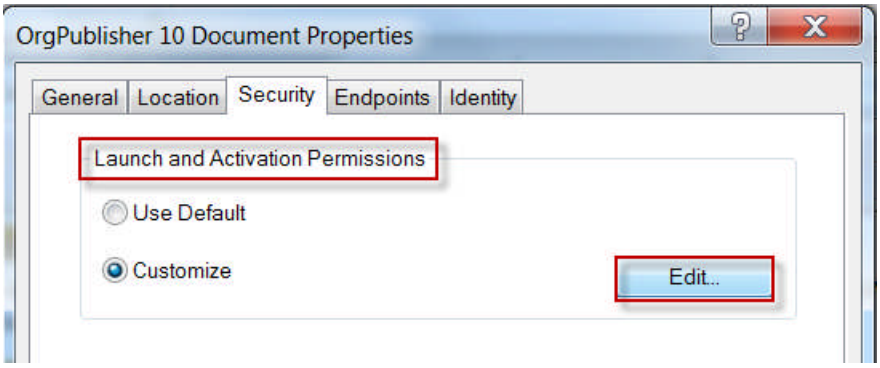

Figure 51. Edit Launch and Activation Permissions

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

5.9 Click **Add**. Then, click **Locations** and change the location to the **Server**. Click **OK**.

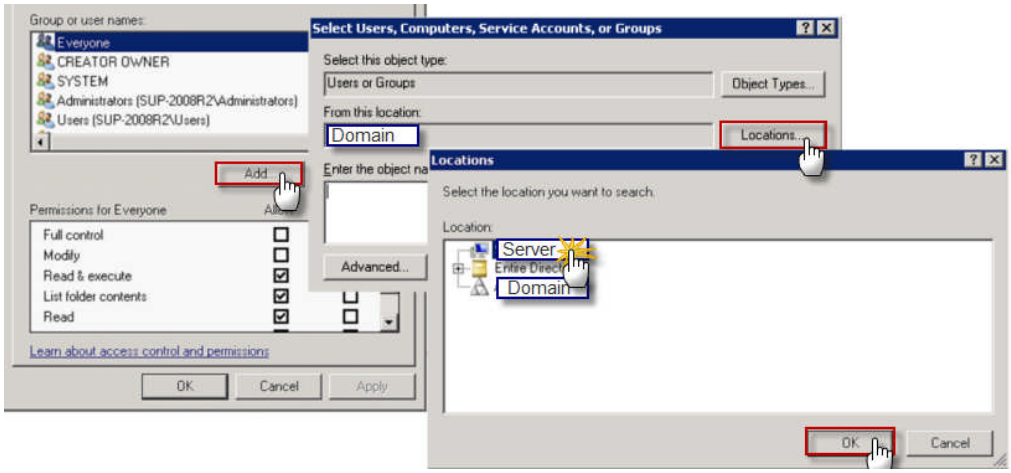

Figure 52. Add Groups in Launch and Activation Permissions

5.10 In the *Select Users or Groups* dialog, click **Advanced** and in the dialog that displays, select **Find Now**.

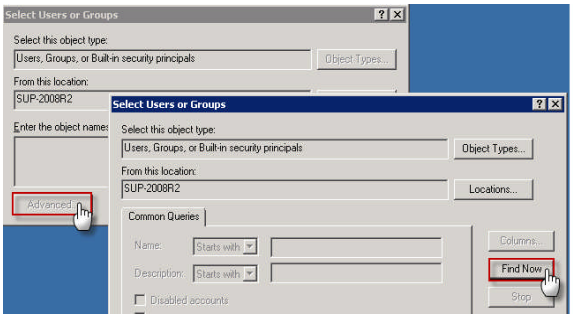

Figure 53. Select Users or Groups

5.11 Add the following groups:
- Local **Administrators Group**
- Local **Interactive Group**
- Local **IUSR Account**
- Local **IWAM Account**
- Local **Network Group**
- Local **Network Services Group**
- Local **OPweb_LG Group**
- Local **System Group**

Click **OK** to add the groups

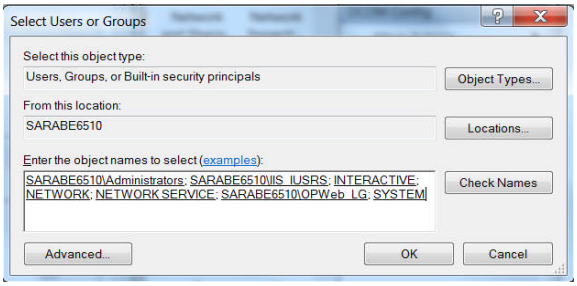

Figure 54. Select Users or Group

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

5.12 Enable the following **Launch and Activation Permissions**:

– Local **OPweb_LG Group**	**All options**
– Local **Administrators Group**	**Local Launch**
– Local **Interactive Group**	**Local Launch**
– Local **IUSR Account**	**Local Launch**
– Local **IWAM Account**	**Local Launch**
– Local **Network Group**	**Local Launch**
– Local **Network Services Group**	**Local Launch**
– Local **System Group**	**Local Launch**

Click **OK** to close **Launch and Activation Permissions**.

5.13 Under **Access Permissions**, click **Edit**.

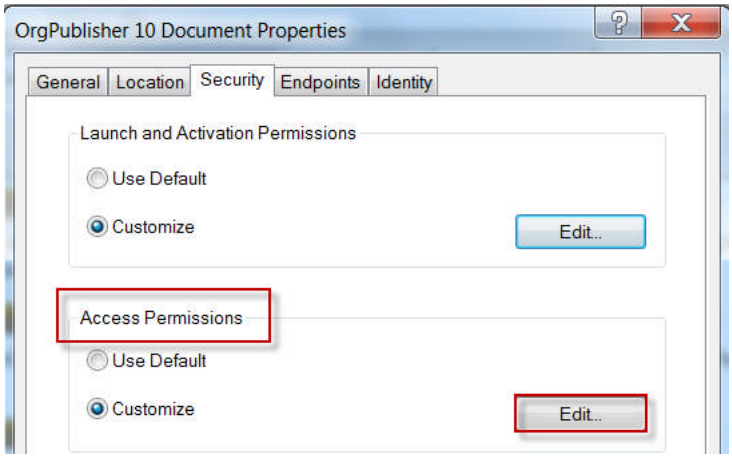

Figure 55. Access Permissions

5.14 Click **Add**. Then, click **Locations** and change the location to the **Server**. Click **OK**.

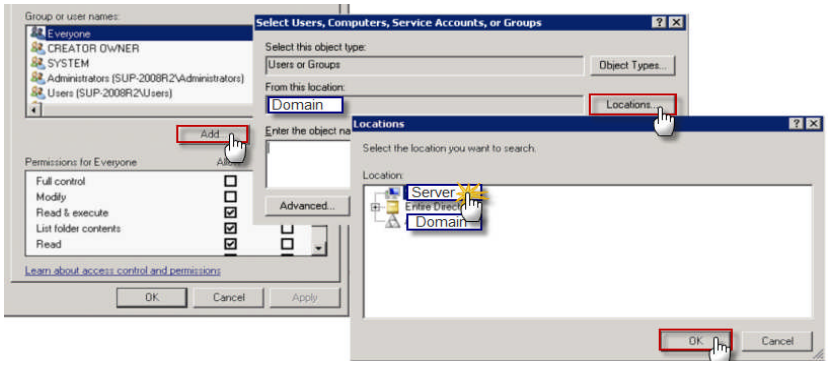

Figure 56. Add Groups in Access Permissions

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

5.15 In the *Select Users or Groups* dialog, click **Advanced** and in the dialog that displays, select **Find Now**.

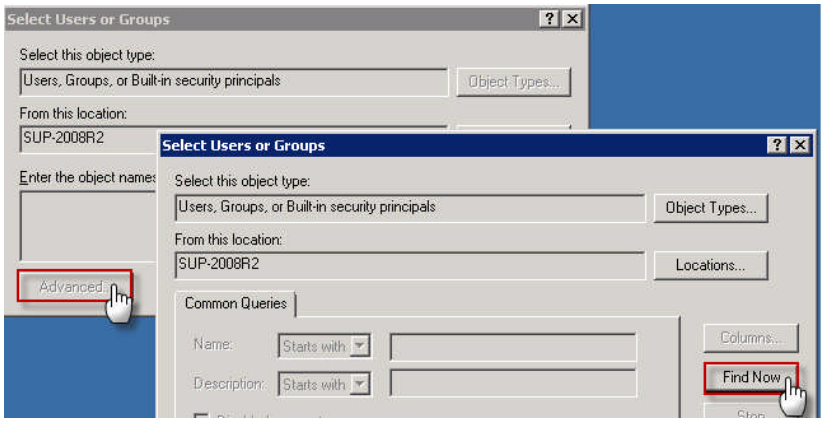

Figure 57. Select Users or Groups

5.16 Select the following **groups** from the search results and click **OK**:

- Local **Administrators Group**
- Local **Interactive Group**
- Local **IUSR Account**
- Local **IWAM Account**
- Local **Network Group**
- Local **Network Services Group**
- Local **OPweb_LG Group**
- Local **System Group**

Click **OK** to add the groups.

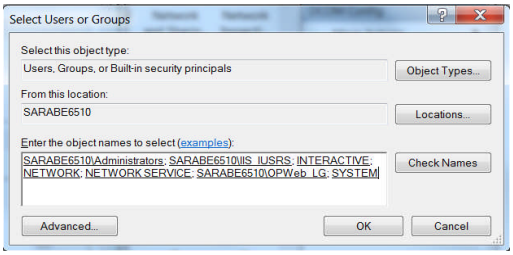

Figure 58. Select Groups

5.17 Enable the following **Access Permissions**:

o Local **OPweb_LG Group**	**Both options**
o Local **Administrators Group**	**Local Access**
o Local **Interactive Group**	**Local Access**
o Local **IUSR Account**	**Local Access**
o Local **IWAM Account**	**Local Access**
o Local **Network Group**	**Local Access**
o Local **Network Services Group**	**Local Access**
o Local **System Group**	**Local Access**

Click **OK** to close the Access Permissions dialog and **OK** to close the OrgPublisher X Document window.

The Windows 2003 OrgPublisher Web Administration setup is complete. Now, proceed to test Web Administration and EChart Publishing to ensure everything is correctly configured.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Testing OrgPublisher Web Administration

- The following tests will help determine if Web Administration is configured correctly. If the following tests are performed successfully, the OrgPublisher Web Administration installation is correctly configured.
- If errors display while testing, review:
  - NTFS permissions
  - IIS configurations
  - DCOM settings
  - Refer to the Troubleshooting Tips in this Installation Guide to determine if additional settings may be needed.
- If errors still occur after checking the configurations and reviewing the troubleshooting tips, please contact Aquire Support for further assistance.

Prerequisites for Testing Web Administration

- It is recommended to test Web Administration on a workstation rather than the server. In addition, the Web Server Administrator may want to add their user account to the OPWeb_LG group for the purpose of accessing Web Administration with the same rights as the Chart Administrators.
- To open OrgPublisher Web Administration, users must have a Web Administration pluginX file, orgpub32.ocx. Users will be prompted to download the pluginX file from the Aquire Web Site when visiting the Web Administration URL for the first time.
- Users must be administrators on their machines in order to install pluginX files.
- Refer to OrgPublisher 10 PluginX Implementation Guide for more information on pluginX controls.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Test Web Administration

1. Open **Internet Explorer** and type in the URL for OrgPublisher Web Administration: http://<servername>/opweb/Opadmin.htm

   Note: <servername> is the name of the server on which OrgPublisher is installed.

2. If prompted, install the Web Administration pluginX file from the Aquire Web Site.
3. OrgPublisher Web Administration should open.

   Note: Click OK if a prompt displays with the message that reads, No Charts Exist Yet.

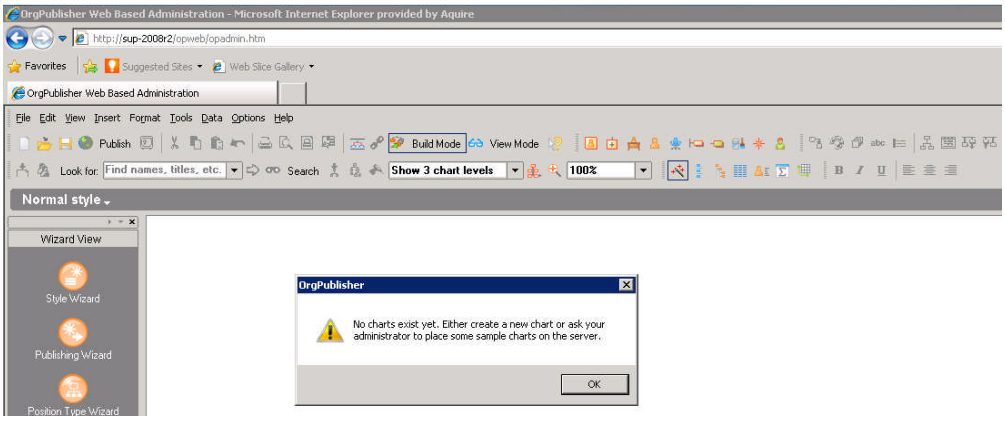

Figure 59. Web Administration View

Prerequisites for Testing Web Admin Publishing to EChart Rich Client

- It is recommended to test Web Administration on a workstation rather than the server. In addition, the server administrator may want to add their user account to the OPWeb_LG group for the purpose of accessing Web Administration with the same rights as the Chart Administrators.
- To open an OrgPublisher Echart Rich Client Chart, users must have a pluginX viewer, orgpubx.ocx. Users will be prompted to download the pluginX file from the Aquire Web Site when clicking on a chart link for the first time.
- Users must be administrators on their machines in order to install pluginX files.
- Refer to the OrgPublisher 10 PluginX Implementation Guide for more information on pluginX controls.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Test Publishing an EChart Rich Client Chart

1. In the Web Administration URL (http://<Servername>/opweb/opadmin.htm), go to the **File** Menu and select **New**
2. The **Select a Chart to Open** dialog displays. Click **New**.

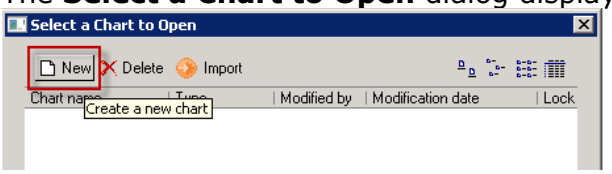

Figure 60. Select a Chart to Open

3. The **New Chart Wizard** Opens. Select **Organizational Chart**.

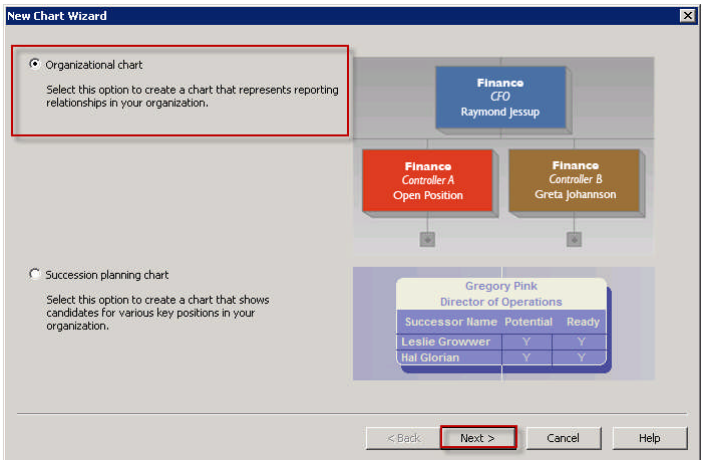

Figure 61. Select Organizational Chart

4. Select **Empty Chart** as the data source. Click **Next**.

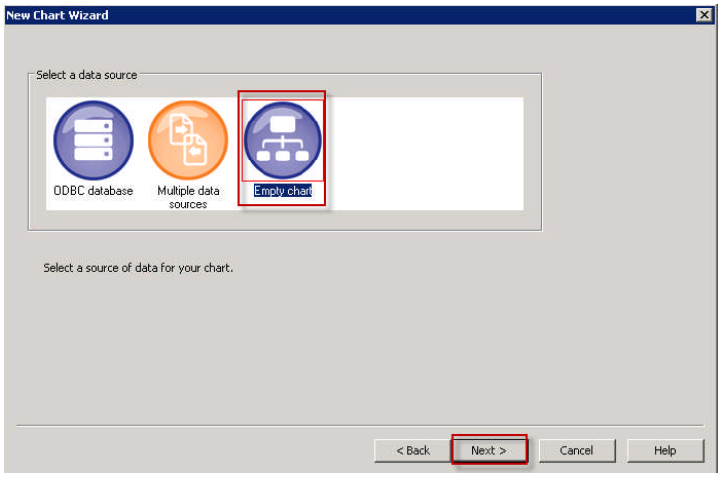

Figure 62. Select Empty Chart

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

5. **Uncheck Lauch the Style Wizard**. Then, click **Finish**.

Empty chart
You have finished setting up the data for your chart. Click Finish to display the chart.
The style wizard will allow you to easily setup the first chart style. Additional chart styles can be added later by running the Style Wizard from the tools menu.
Launch the style wizard

Figure 63. Uncheck Lauch Style Wizard

6. In the toolbar, click on **Insert Box Containing a Person** button.

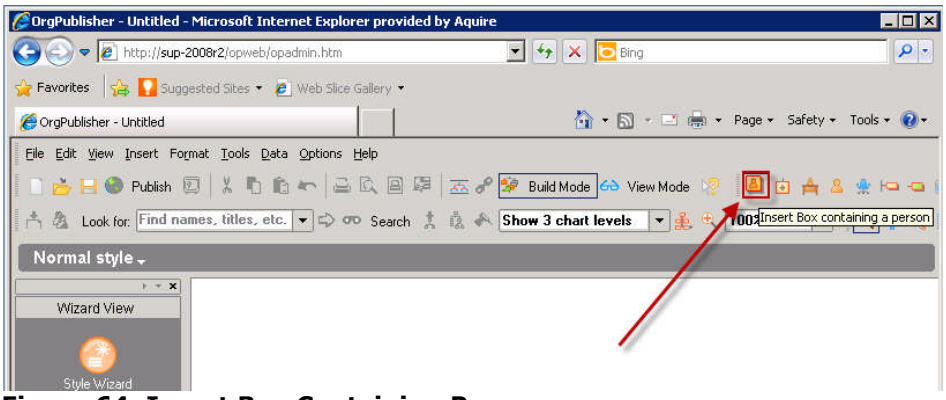

Figure 64. Insert Box Containing Person

7. Drop the box containing a person in the chart white space.

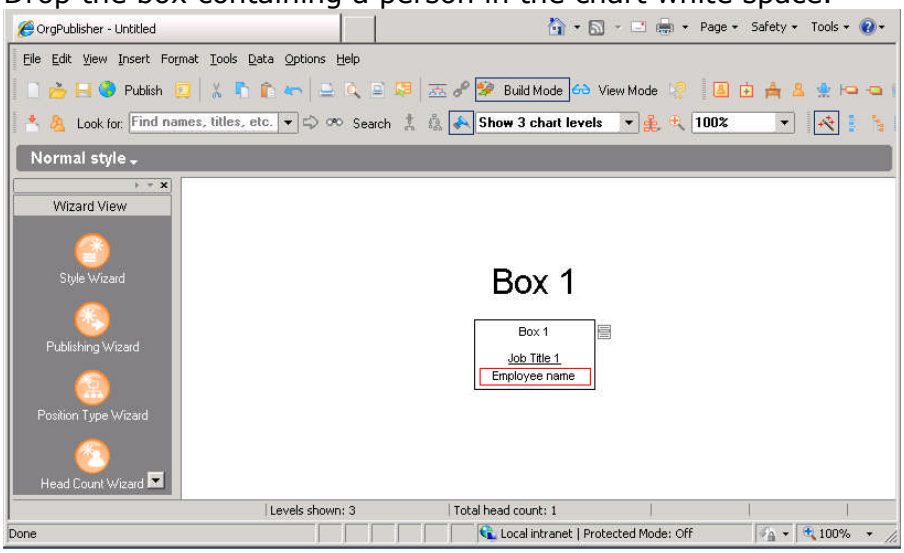

Figure 65. Create a one box chart

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

8. Click on the **Publish** button in the toolbar.

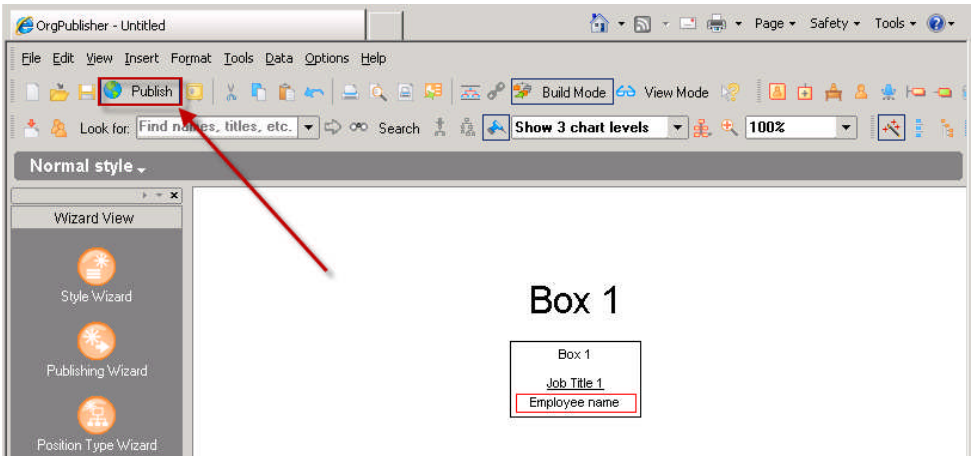

Figure 66. Click the Publish button

9. The Publishing Wizard opens. Select **Advanced Mode**. Then, click **Next**.

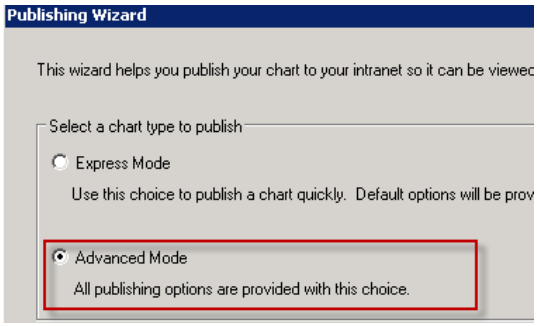
Publishing Wizard
This wizard helps you publish your chart to your intranet so it can be viewed
Select a chart type to publish
Express Mode
Use this choice to publish a chart quickly. Default options will be prov
Advanced Mode
All publishing options are provided with this choice.

Figure 67. Advanced Mode

10. Click **Next** again. Then, enter a name for the test chart. Click **Next**.

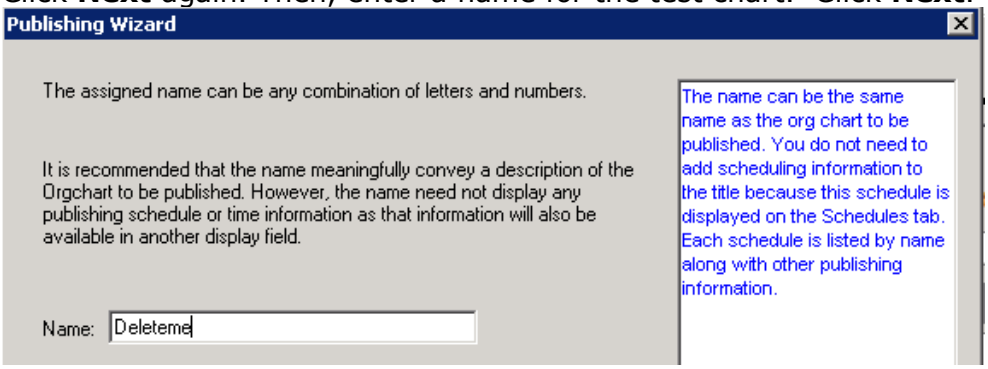
Publishing Wizard
The assigned name can be any combination of letters and numbers.
It is recommended that the name meaningfully convey a description of the Orgchart to be published. However, the name need not display any publishing schedule or time information as that information will also be available in another display field.
Name: Deleteme
The name can be the same name as the org chart to be published. You do not need to add scheduling information to the title because this schedule is displayed on the Schedules tab. Each schedule is listed by name along with other publishing information.

Figure 68. Name the Chart

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

11. Select **Interactive Org Chart** and click **Next**.

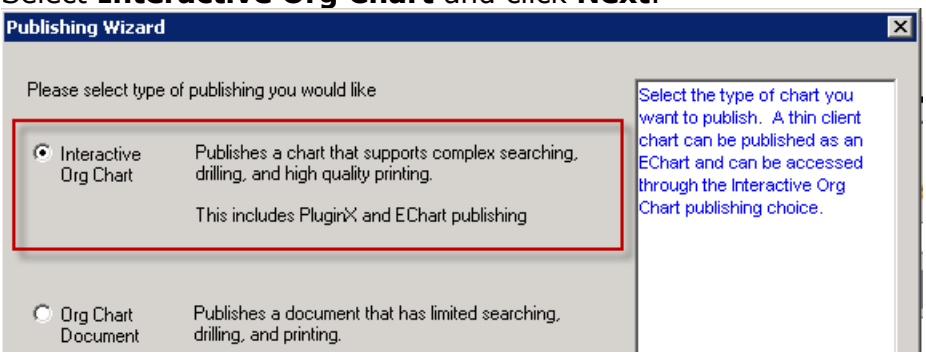
Publishing Wizard
Please select type of publishing you would like
Interactive Org Chart
Publishes a chart that supports complex searching, drilling, and high quality printing.
This includes PluginX and EChart publishing
Org Chart Document
Publishes a document that has limited searching, drilling, and printing.
Select the type of chart you want to publish. A thin client chart can be published as an EChart and can be accessed through the Interactive Org Chart publishing choice.

Figure 69. Interactive Org Chart

12. Select **Echart** and click **Next.**

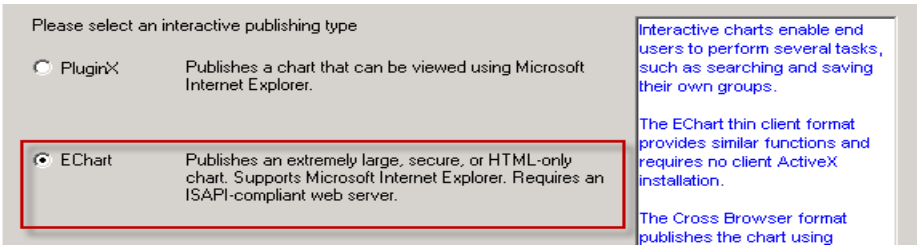
Please select an interactive publishing type
PluginX
Publishes a chart that can be viewed using Microsoft Internet Explorer.
EChart
Publishes an extremely large, secure, or HTML-only chart. Supports Microsoft Internet Explorer. Requires an ISAPI-compliant web server.
Interactive charts enable end users to perform several tasks, such as searching and saving their own groups.
The EChart thin client format provides similar functions and requires no client ActiveX installation.
The Cross Browser format publishes the chart using

Figure 70. EChart

13. Click **Next** and then **Next** again. Select **Rich client using PluginX**. Click **Next**.

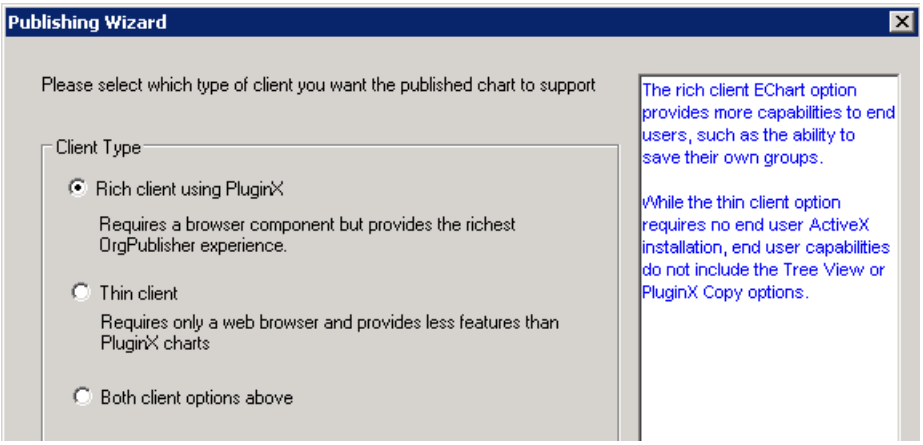
Publishing Wizard
Please select which type of client you want the published chart to support
Client Type
Rich client using PluginX
Requires a browser component but provides the richest OrgPublisher experience.
Thin client
Requires only a web browser and provides less features than PluginX charts
Both client options above
The rich client EChart option provides more capabilities to end users, such as the ability to save their own groups.
While the thin client option requires no end user ActiveX installation, end user capabilities do not include the Tree View or PluginX Copy options.

Figure 71. Echart Rich Client

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

14. Enter the **virtual path** to the **PublishedCharts** folder, **http://Servername/opweb/PublishedCharts**

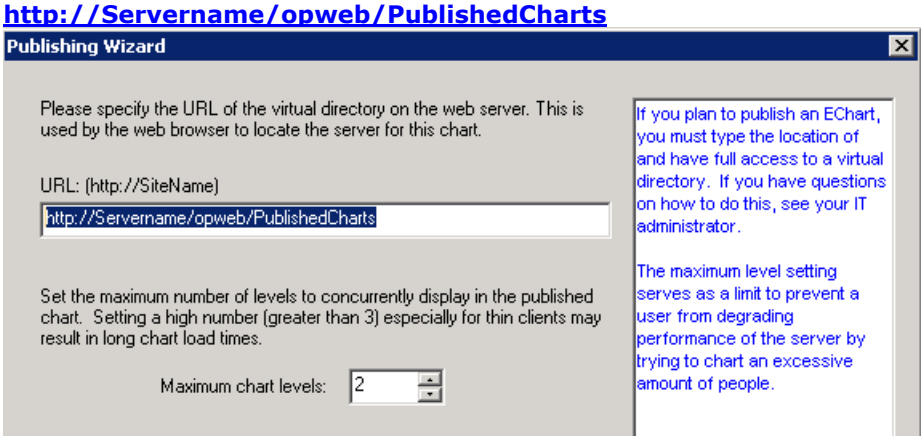
Publishing Wizard
Please specify the URL of the virtual directory on the web server. This is used by the web browser to locate the server for this chart.
URL: (http://SiteName)
http://Servername/opweb/PublishedCharts
Set the maximum number of levels to concurrently display in the published chart. Setting a high number (greater than 3) especially for thin clients may result in long chart load times.
Maximum chart levels:
2
If you plan to publish an EChart, you must type the location of and have full access to a virtual directory. If you have questions on how to do this, see your IT administrator.
The maximum level setting serves as a limit to prevent a user from degrading performance of the server by trying to chart an excessive amount of people.

Figure 72. Virtual Path to PublishedCharts

15. Click **Next** through the remainder of the prompts and then click **Finish** to publish the test chart as an Echart Rich Client Chart.

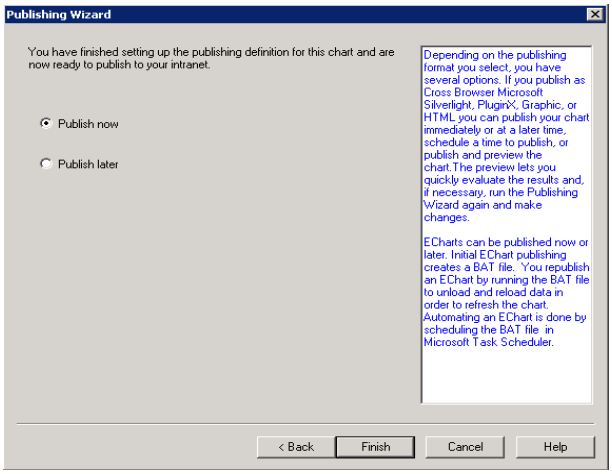
Publishing Wizard
You have finished setting up the publishing definition for this chart and are now ready to publish to your intranet.
Publish now
Publish later
Depending on the publishing format you select, you have several options. If you publish as Cross Browser Microsoft Silverlight, PluginX, Graphic, or HTML you can publish your chart immediately or at a later time, schedule a time to publish, or publish and preview the chart. The preview lets you quickly evaluate the results and, if necessary, run the Publishing Wizard again and make changes.
ECharts can be published now or later. Initial EChart publishing creates a BAT file. You republish an EChart by running the BAT file to unload and reload data in order to refresh the chart. Automating an EChart is done by scheduling the BAT file in Microsoft Task Scheduler.
< Back
Finish
Cancel
Help

Figure 73. Publish the Echart

16. Enter a chart name when prompted and click **OK**.

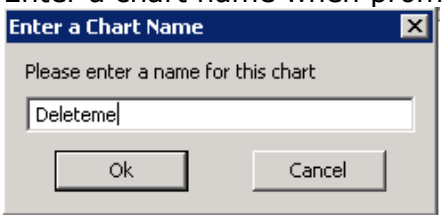

Figure 74. Enter a Chart Name

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

17. In the **Echart Link Summary** window, click on the URL that displays to open the **Echart** in **Internet Explorer**.

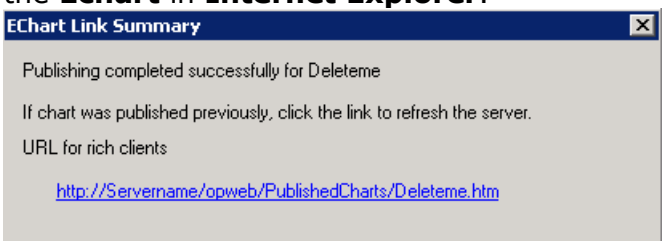
EChart Link Summary
Publishing completed successfully for Deleteme
If chart was published previously, click the link to refresh the server.
URL for rich clients
http://Servername/opweb/PublishedCharts/Deleteme.htm

Figure 75. Echart Link Summary

Note: If you did NOT enable all unknown ISAPI extensions in the Server setup, you will need to configure the chart.dll (step 4.8) before being able to view the published chart.

18. Install the pluginX viewer from the Aquire web site if prompted. The chart should display in the browser.

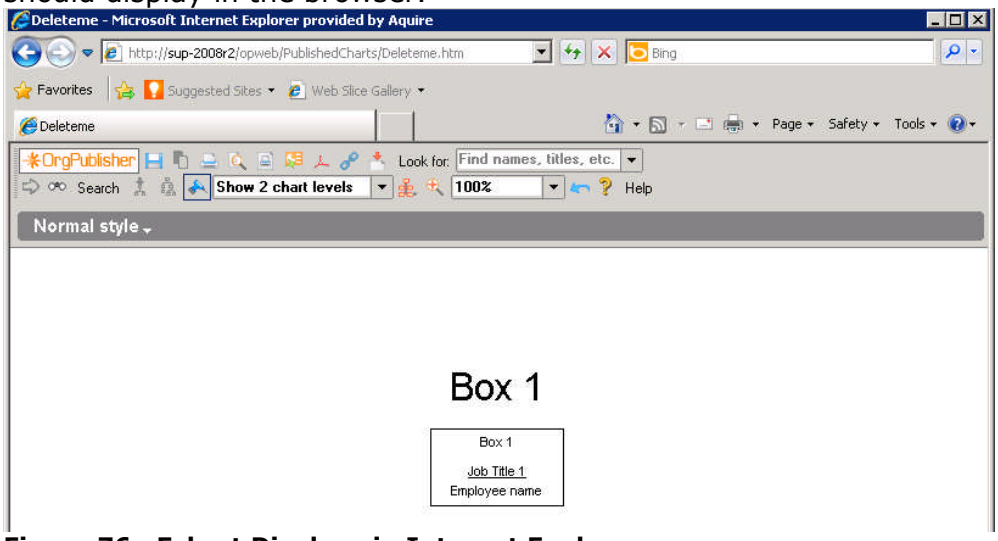

Figure 76. Echart Displays in Internet Explorer

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Web Administration Next Steps

Review the list of items below so that your Chart Administrators have what is needed to begin using charts with Web Administration:

- Provide the following links to the Chart Administrators:
  - ✓ Web Administration URL (Ex. http://servername/opweb/opadmin.htm)
  - ✓ PublishedCharts URL (Ex. http://servername/opweb/publishedcharts)
- If a Chart Administrators is not an administrator on his/her machine, he/she will need assistance downloading the Web Administration pluginX.
- If the Chart Administrator is using an ODBC connection to a database, a system DSN must be created on the server where OrgPublisher is installed.
- If the Chart Administrator uses text files or csv files that are not in Standard OrgPublisher field order, mapping text files must be done by an administrator on the server through the OrgPublisher client.

  Note: If the server administrator will need to assist with mapping text files in OrgPublisher, it is recommended that a default chart file is created one time on the server using the OrgPublisher client. Then, Chart Administrators can use the default file as the basis for creating new charts by following these directions:

  1. Open the default file.

  2. In the File Menu, Select Save As and create a new chart name for the file.

  3. The data connection remains the same and can now be used to create new organizational charts.
- If Chart Administrators require access to import and overwrite existing data files from their desktop to the SourceCharts folder, this cannot be done from the Web Administration interface. A network share to the SourceCharts folder would be needed for this purpose. Approving network share folder access is the decision of the IT department and is not part of the standard OrgPublisher Web Administration installation.
- If Chart Administrators require access to copy formatting files (otm files) to use with new chart data files, a network share to the PublishedCharts folder would be needed for this purpose. Approving network share folder access is the decision of the IT department and is not part of the standard OrgPublisher Web Administration installation.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Troubleshooting Tips

1. If a grey bar displays in the Internet Explorer window (but no chart), set a MIME type of .OCP on the PublishedCharts folder.

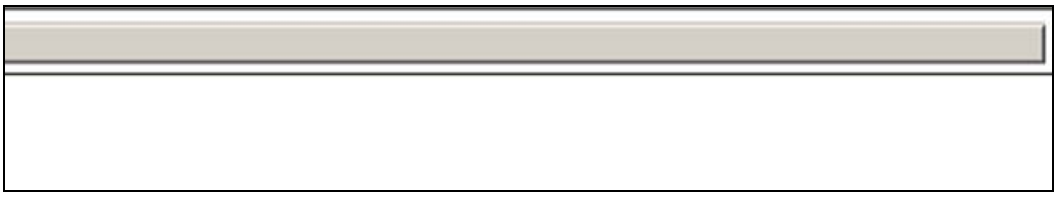

Figure 77. Grey Bar displays without .ocp MIME type

2. Error: "Unable to contact the remote server.dll at this URL." The paths to the virtual directory and URL were, likely, not entered correctly upon install, or the permissions are not set. This may require a reinstall, per the installation guide.

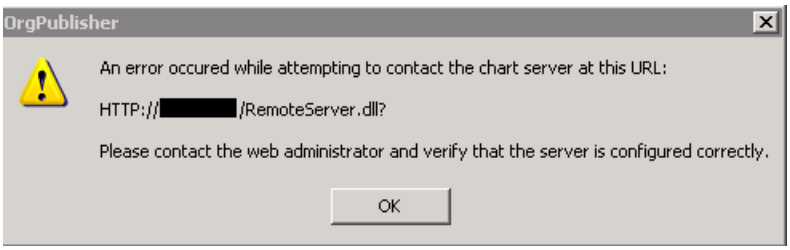
OrgPublisher
An error occured while attempting to contact the chart server at this URL:
HTTP://[redacted]/RemoteServer.dll?
Please contact the web administrator and verify that the server is configured correctly.
OK

Figure 78. RemoteServer.dll Error

3. Chart administrator or end users get a blank Internet Explorer screen, with a red X in the upper left corner indicates a problem installing and registering the ActiveX control.

   Installing ActiveX controls requires administrative rights on the PC. The IT group can request Aquire's MSI scripts to assist in pushing out the plugins. Please contact support@aquire.com if MSI scripts are required. Include the full version number of OrgPublisher installed on the server (Go to Help > About OrgPublisher). Ex. 10.1.3042.1

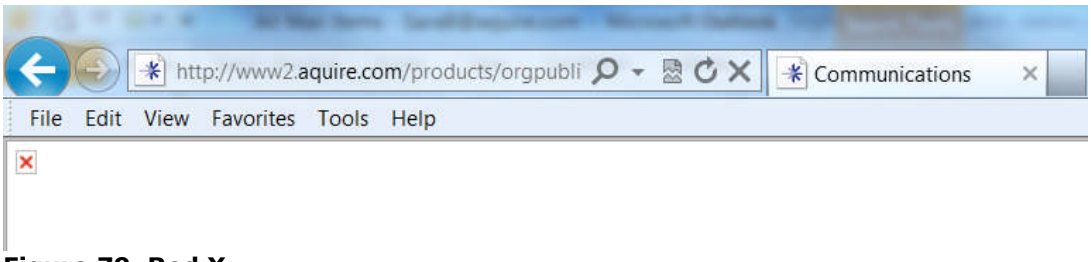

Figure 79. Red X

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

4. Error: "Unable to instantiate OrgPub32 as an automation server" indicates a permission or installation error. Verify the DCOM permissions (dcomcnfg) are correct. If the error still occurs, adjust settings to include the following DCOM permissions:
   - ✓ In the DCOM permissions (under the **OrgPublisher X Document Identity tab**), select **the Launching User**

   Note: If the error still continues, this may require a reinstall per the installation guide.

OrgPublisher
An error occurred while publishing all charts. Unable to instantiate OrgPub32 as an automation server. Please verify that OrgPublisher is installed correctly on the web server.
OK

Figure 80. Unable to Instantiate error

5. Understanding HTTP error messages and their associated status codes is important when you need to troubleshoot IIS. A few common errors on the client side (4xx error) and server side (5xx error) are listed below:

Error Code	Definition
400	Bad Request; the server cannot service the request, usually because of an incorrect URL.
401	Unauthorized; the users credentials were not accepted by the authorization process.
403	Forbidden; the request could not be serviced for a number of reasons, even though the user was authenticated.
404	Not Found; the server cannot locate the requested file.
405	Method Not Allowed; the client incorrectly issues a HTTP GET request when a HTTP POST request should have been issued.
406	Not Acceptable; the requested file is not supported by the client.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.

Error Code	Definition
407	Proxy Authentication Required; the client has to authenticate with the proxy server before its request can be serviced.
410	Gone; the server no longer has the requested file.
500	Internal Server Error; indicates a typical server side error.
501	501 Not Implemented; the server does not support the HTTP method requested by the client.
502	Bad Gateway; an invalid response was received by the upstream server for which this server is a gateway.
503	Service Unavailable; the server does not support the service requested by the client.

The information contained in this document is confidential and proprietary to Aquire Solutions, Inc. This information may not be distributed or used for any purpose other than the evaluation of Aquire Solutions, nor may it be disclosed to any party without the prior written consent from Aquire. Copyright © 2001 - 2011 Aquire. All Rights Reserved.